Travel Activities & Motivation Survey

Touring Segmentation Report

TAMS
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October, 2001

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Ontario Ministry of Tourism, Culture & Recreation

Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

Tourism B.C.

Tourism Toronto

Yukon Government Department of Tourism

Prepared by:

Lang Research Inc.

ISBN (print): 0-7794-2270-8

ISBN (Internet): 0-7794-2271-6

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Touring Segmentation

- Key Findings -

The Canadian and American markets may be divided into six segments with respect to their participation in touring activities. Forty percent of the market did not participate in activities which would indicate that touring travel had taken place in the last two years. The remaining five segments were divided according to the particular touring orientation of their vacation pursuits: Personal Explorers (24 %), Scenic Tour Seekers (10 %), Wine Tours Enthusiasts (9 %), Exotic Tour Seekers (9 %), and Ocean Cruise Enthusiasts (8 %).

Wine Tour Enthusiasts

Wine Tour Enthusiasts account for 8.7 % of Canadian travellers and 9.6 % of American travellers. They are over-represented among the Affluent Mature and Senior Couples, Affluent Young Couples and Affluent Mature Singles, and report above average household incomes and levels of education. Wine Tour Enthusiasts have travelled frequently over the past two years, both domestically and internationally. They are also more likely than the average traveller to be planning a trip in Canada over the next two years (73% versus 68%). Moreover, they represent an important off-peak travel market since they are 25 % more likely than the typical traveller to take a trip during the low seasons.

Canadian Wine Tour Enthusiasts seem very aware of the country's main wine regions, and were more likely than the average Canadian traveller to have visited Ontario and British Columbia. However, American Wine Tour Enthusiasts were no more likely to have visited Ontario and British Columbia than the average American visitor to Canada.

Wine Tour Enthusiasts undertake vacation travel primarily for exploration and personal indulgence. They are likely to patronize the high arts (ballet, opera), seek out natural attractions, and appear drawn to garden attractions. Satisfying their personal indulgences while on vacation trips goes beyond enjoying food and wine, and includes shopping and casino gambling. They also prefer luxury accommodations (resort, B&B, spa or gourmet restaurant).

Wine Tour Enthusiasts participate in a wide range of outdoor activities while on vacation, including golfing, sailing, canoeing, kayaking and hiking. Along with wine tours, Wine Tour Enthusiasts showed above average interest in other touring activities, such as guided country or city tours, scenic day tours by air, and ocean cruises.

Touring Segmentation

- Key Findings (Continued) -

Scenic Tour Seekers

Scenic Tour Seekers represent 8.9 % of Canadian travellers and 9.5 % of American travellers. Their levels of education and household income were lower than those of other touring travellers. Mature Mainstream Singles and Senior Singles were especially over-represented within this segment.

Scenic Tour Seekers travelled less often than the average traveller, and were less likely to travel domestically. The percentage of American Scenic Tour Seekers with plans to visit Canada was comparable to the average American traveller.

Scenic Tour Seekers were most likely to seek out exploratory vacation experiences (especially visiting museums, art galleries and historical sites), and were unlikely to use their vacations to seek out romance and relaxation. Guided tours of a city or the countryside were the most preferred touring activities. Scenic Tour Seekers were less likely to participate in outdoor activities, and showed average participation levels in most culture and entertainment activities. They were also more likely to use a motorhome or travel trailer, suggesting that "scenic touring" is the main travel pursuit of this segment.

Personal Explorers

Personal Explorers are the largest of the touring segments, accounting for 23.0 % of Canadian travellers and 24.2 % of American travellers. Generally, they are younger than other touring travellers, and have above average household incomes and education levels. Affluent Young Couples and Affluent Mature and Senior Couples were especially over-represented within this segment.

Relative to the average traveller, Canadian Personal Explorers were more likely to have travelled domestically and American Personal Explorers were more likely to have visited Canada during the past two years. Moreover, both Canadian and American Personal Explorers were more likely to expect to vacation in Canada during the next two years.

Personal Explorers sought out a broad range of vacation experiences during the past two years. They were especially likely to have sought out exploratory vacation experiences, and frequently use their vacations as opportunities for romance and relaxation. Personal Explorers are also quite active in outdoor activities including natural sightseeing, canoeing, kayaking and hiking. Their prime cultural and entertainment pursuits include shopping and dining, and visiting museums, art exhibits and historical sites.

Personal Explorers tour almost exclusively by personal vehicle. With the exception of a marked interest in wine tours, they were less likely than the average traveller to embark on other types of day or overnight touring activities. Travel packages also were less often purchased by Personal Explorers than by other travellers.

Touring Segmentation

- Key Findings (Continued) -

Exotic Tour Seekers

Exotic Tour Seekers represent 8.9 % of Canadian travellers and 9.4 % of American travellers. They report above average education levels and household incomes, but are less distinctive from a demographic perspective than other touring segments.

Exotic Tour Seekers were more likely than others to visit countries beyond North America and the Caribbean (20% versus 14%), but were also more likely to travel domestically than the average traveller. Moreover, both Canadian and American Exotic Tour Seekers were more likely than the average traveller to have plans to travel in Canada over the next two years.

Exotic Tour Seekers were likely to seek out exploratory vacation experiences. They exhibit particular interest in natural sightseeing and visiting natural phenomena. They also were more likely than the average traveller to have participated in vigorous physical activity outdoors, including fitness activities, canoeing, kayaking, hiking, sailing, windsurfing and scuba diving. Exotic Tour Seekers also displayed a marked interest in visiting gardens and natural attractions, as well as zoos, aquariums and planetariums, a reflection of their interest in opportunities to explore the natural world. Their desire to get back to nature was also reflected in their choice of accommodations, which includes stays at lodges or cottages.

Ocean Cruise Enthusiasts

Ocean Cruise Enthusiasts were the smallest of the touring segments, accounting for only 5.3 % of Canadian travellers and 8.0 % of American travellers. They have the highest household incomes of the five touring segments ($66,700), and are also the oldest. Affluent Mature and Senior Couples and Mainstream Senior Couples were especially over-represented within this segment.

Ocean Cruise Enthusiasts are clearly drawn to southern destinations. They are three times more likely than other travellers to have visited Mexico or the Caribbean in the past two years. They also were more likely than the average traveller to have visited other international vacation destinations (22% versus 14%). Their vacation travel exhibits a clear seasonal pattern, as they were 14 % more likely to have taken a trip during the off-peak travel seasons (fall, winter and spring).

Ocean Cruise Enthusiasts sought out vacation experiences that provided opportunities for personal indulgence and for exploration. They were much more likely than other travellers to visit casinos and theme parks. Their preferred outdoor activities include sailing, swimming and sunbathing, viewing natural phenomena, and golfing. Their exploratory vacation pursuits included visiting museums, art exhibits and historical sites. Ocean Cruise Enthusiasts were also more likely than the average traveller to take guided tours of cities or the countryside, and to stay in hotels and seaside resorts. They were also much more likely than other travellers to purchase travel packages for their trips.

Section One

Introduction

Background

An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators, and provides a rich and authoritative database to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. TAMS consisted of both a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years, or expressed interest in travel in the next two years, were asked to complete a mailback questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these, 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire, while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

This current study presents a way to view the touring market, by identifying various segments of the market with similar patterns in the types of day and overnight tours taken over the last two years of travel. This partitioning of the market is referred to as the *Touring Segmentation*. This report profiles each of these segments by demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations, and impressions of Canada and Ontario.

The *Touring Segmentation* is intended to provide greater insight into different interests that exist within the market for various types of vacation touring activities. This information can be used to develop strategic initiatives to attract selected sectors of the market to Canada and Ontario.

Touring Segmentation
Construction of Segmentation Scheme

The Touring Segmentation was developed using a two-stage process.

In the first stage, a series of prime core segmentors were constructed to identify patterns in the day and overnight touring activities of individuals while on a trip during the past two years. These variables were submitted to a nearest centroid cluster analysis through an iterative process, to produce several possible segmentation solutions. In total, 17 segmentation solutions were constructed and tested for their ability to identify sectors of the market with common interest in touring activities, before selecting the final segmentation solution. It is acknowledged that segmentation analyses, like all segmentation research, is partly statistical and partly artistic in nature. Statistical procedures such as discriminant analysis were employed to assess the integrity and apparent validity of the interim segmentation solutions. While a large variety of core segmentors were developed and tested in this process, the final clustering solution selected for the Touring Segmentation was based on the following 12 core segmentors:

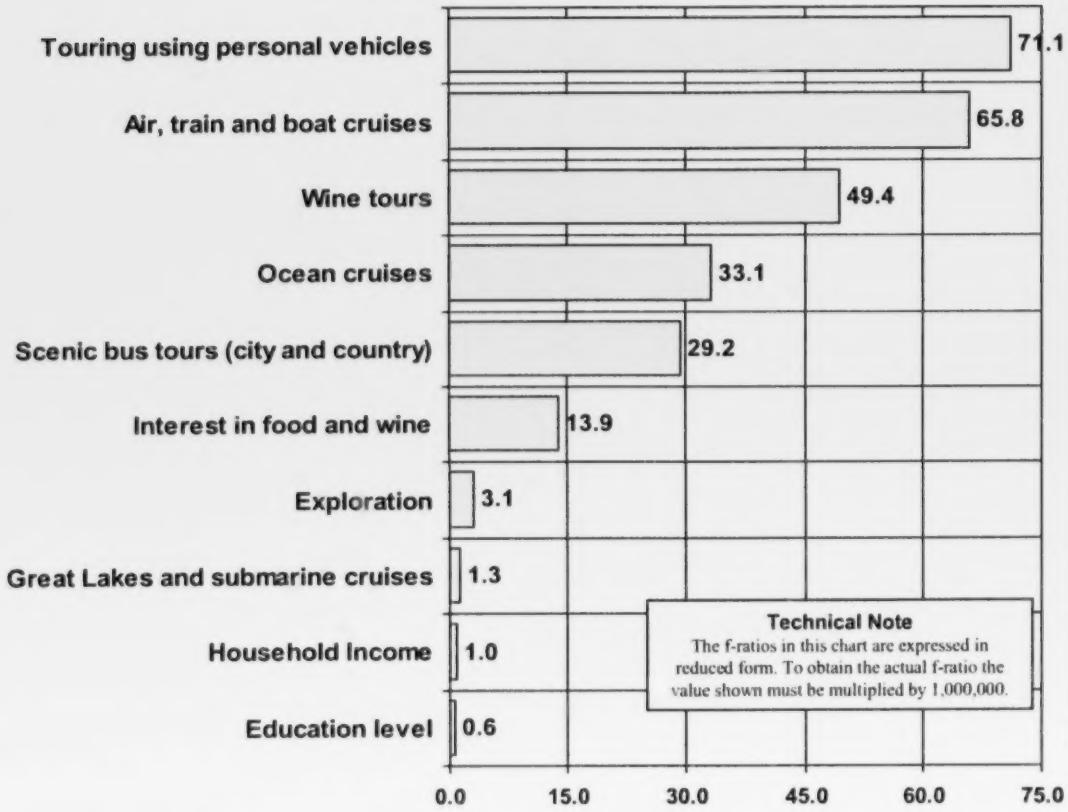
1. The extent to which individuals had taken day and overnight scenic bus tours of cities or the countryside
2. The extent to which individuals had taken day and overnight wine tours
3. The extent to which individuals had explored small towns/rural areas or taken scenic drives using their own vehicles
4. The extent to which individuals had taken day and overnight air, boat or train tours
5. The extent to which individuals had taken cruises on the Great Lakes or submarine cruises
6. The extent to which individuals had taken an ocean cruise
7. The extent to which the individual had sought out exploratory vacation experiences during the past two years
8. The interest exhibited in wine and cuisine while on vacation
9. The education level of the respondent (i.e., high school or less vs. university/college vs. advanced degrees)
10. The household's annual income (Under $40K; $40K to $80K; More than $80K)
11. The marital status of the respondent
12. Whether the individual was a member of the Youth Segment, the Family Segment, the Mature Segment or the Senior Segment based on the Demographic Lifespan Segmentation (see Technical Appendix for more details).

In the final stage of this analysis, the six identified Touring Segments were profiled using a wide variety of data from both the telephone survey and mailback survey. The results of the profiling analyses form the basis of this current report.

Touring Segmentation

Relative Importance of the Core Segmentors

Base: Percent of Adult Population (18 Plus) Who Took a Vacation in Last Two Years



The relative importance of the 12 core segmentors in determining the Touring Segmentation can be gauged by the extent to which each of the core segmentors differentiates between the six touring segments (as signified by the size of the f-ratio in a one-way ANOVA test). When this is done it can be seen that the extent to which the individuals took tours using their personal vehicles and the extent to which they took tours by air, boat or train were the best overall discriminating core segmentors with f-ratios of 71,057,158 and 65,788,766 respectively. Other important core segmentors include the extent to which the individuals took a wine tour, an ocean cruise or a scenic bus tour, as well as the extent to which they exhibited an interest in wine and cuisine while on a trip. All 12 core segmentors were found to significantly discriminate between the segments at the $p < 0.0001$ level or better.

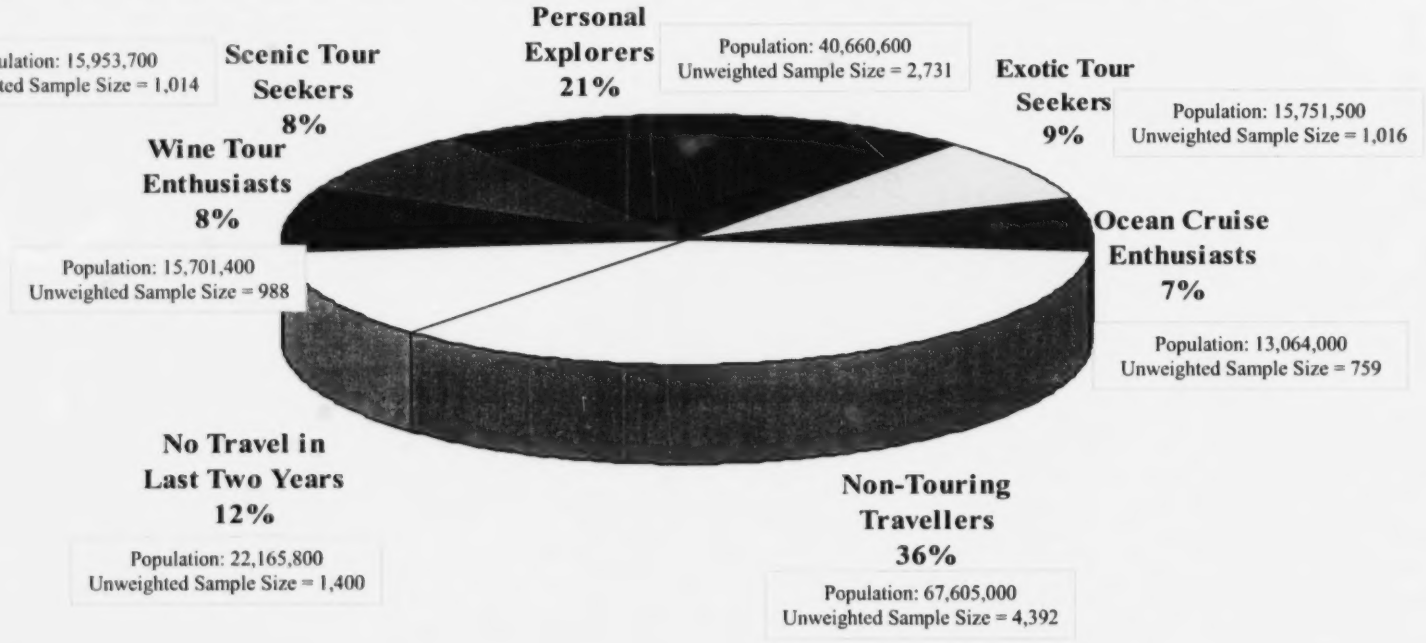
Section Two

Touring Segmentation Overview

Total Adult Population (18 Plus) in Canada and United States

Incidence of Touring Segments

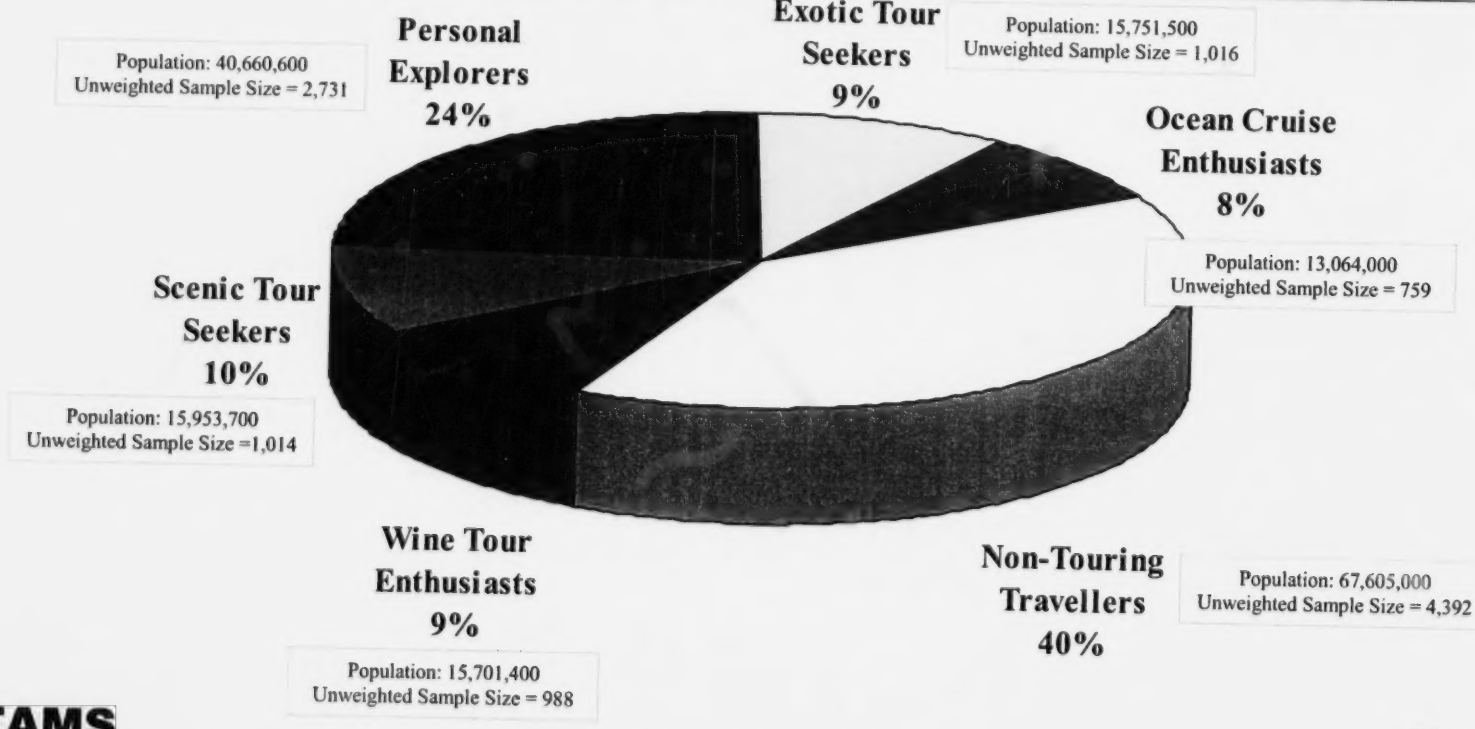
The entire market may be divided into seven segments with respect to their participation in touring activities. Twelve percent of the market did not participate in any tourism travel activities at all in the last two years. Thirty-six percent were classified as Non-Touring Travellers, or those who have taken a trip in the past two years, but were unlikely to have participated in touring activities. The remaining five segments were divided into those with differing interest in the types of tour taken while on a trip, including Personal Explorers (21 %), Exotic Tour Seekers (9 %), Wine Tour Enthusiasts (8 %), Scenic Tour Seekers (8 %) and Ocean Cruise Enthusiasts (7 %).



Adult Population (18 Plus) in Canada & U.S. Who Took a Vacation in Last Two Years

Incidence of Touring Segments

The majority (60%) of those who had taken one or more trips during the past two years, had taken at least one tour. Personal Explorers, who tend to tour using their own vehicles, took the most tours. They represent almost one-quarter of the travellers (24 %). Those participating in more specific types of touring each account for between 8 % and 10 % of the travel market (Scenic Tour Seekers 10% , Wine Tour Enthusiasts 9 %, Exotic Tour Seekers 9%, Ocean Cruise Enthusiasts 8%) .



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TAMS: Touring Segmentation

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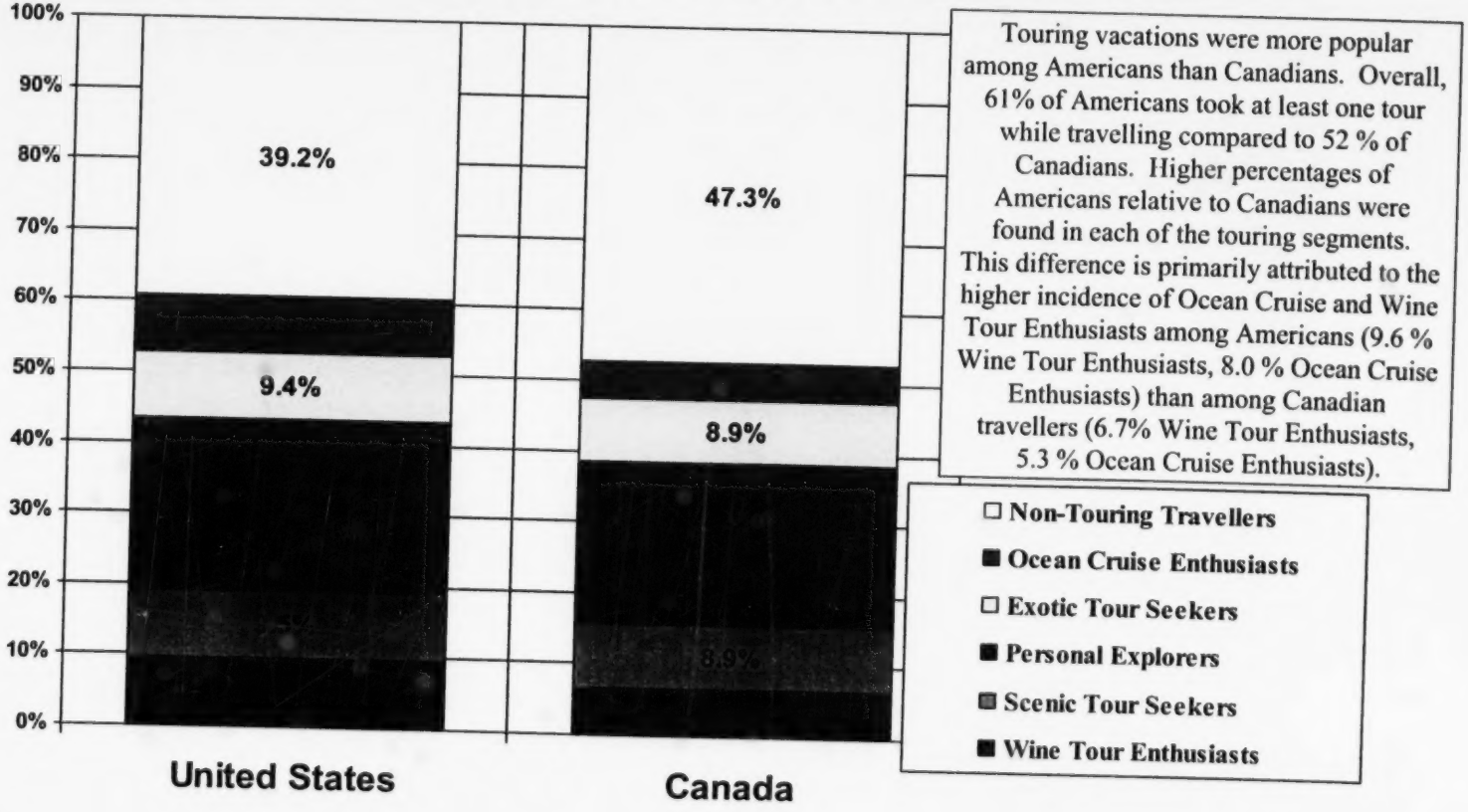
Touring Segmentation

Incidence in Canada versus United States

Base: Percent of Population (18 Plus) Who Took a Vacation in Last Two Years



Touring vacations were more popular among Americans than Canadians. Overall, 61% of Americans took at least one tour while travelling compared to 52 % of Canadians. Higher percentages of Americans relative to Canadians were found in each of the touring segments. This difference is primarily attributed to the higher incidence of Ocean Cruise and Wine Tour Enthusiasts among Americans (9.6 % Wine Tour Enthusiasts, 8.0 % Ocean Cruise Enthusiasts) than among Canadian travellers (6.7% Wine Tour Enthusiasts, 5.3 % Ocean Cruise Enthusiasts).

Adult Population (18 Plus) in Canada and United States Who Took Vacations

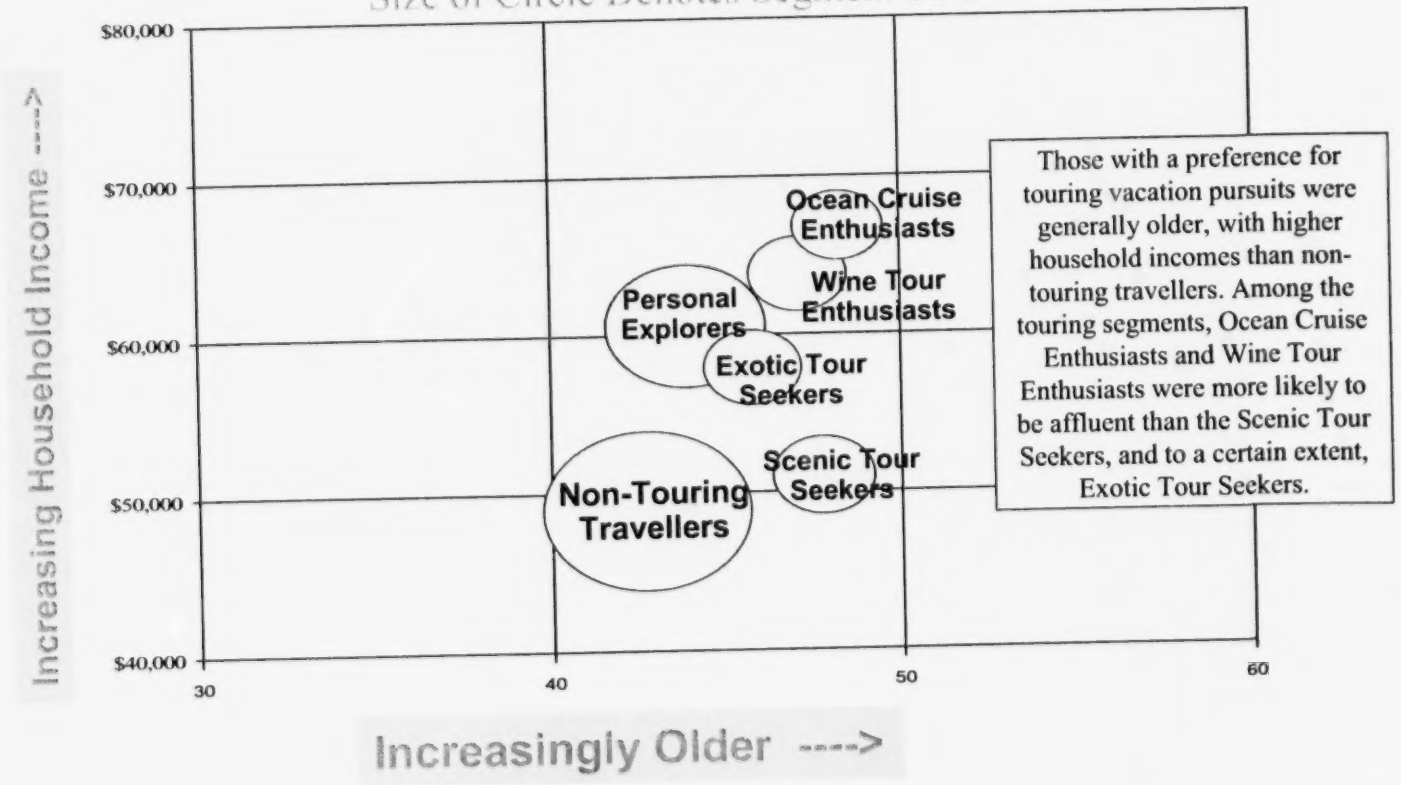
Prime Interests of Touring Segments

Based on Vacation Pursuits During Past Two Years

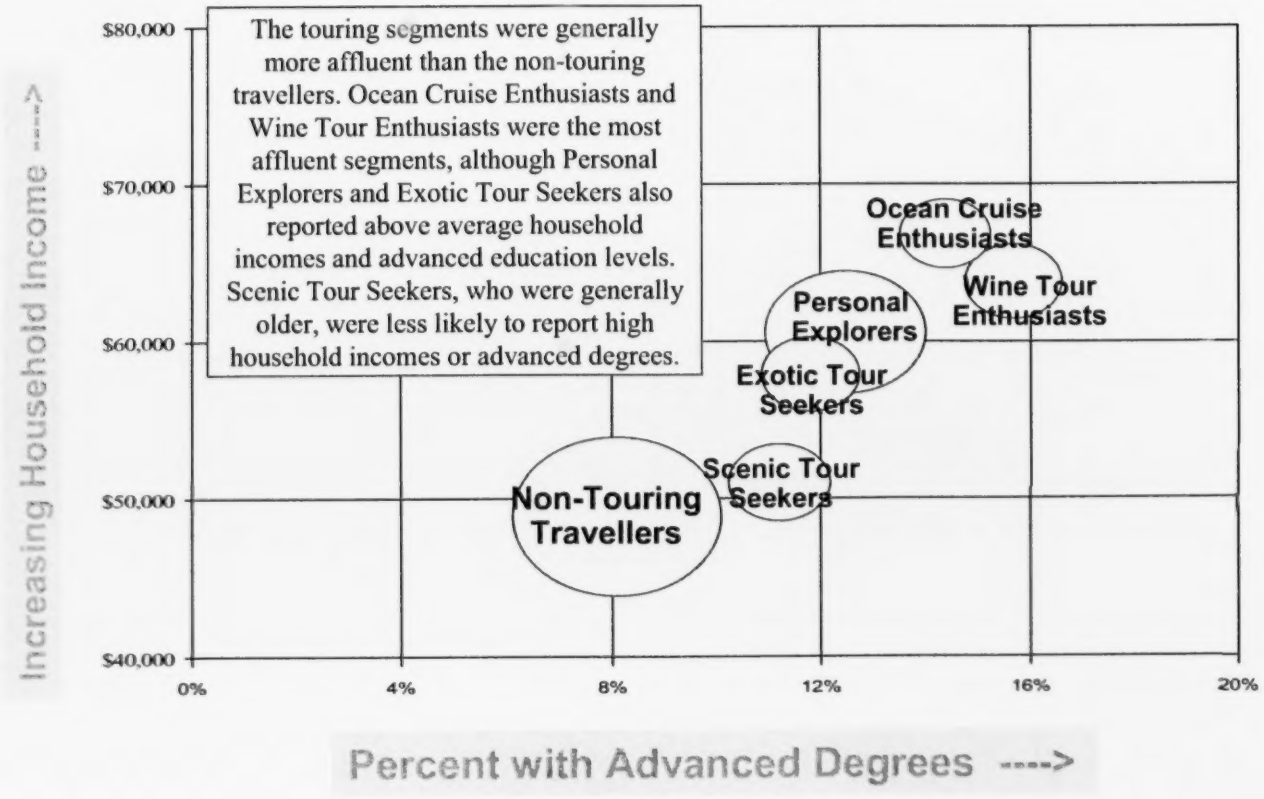
The primary touring activities of the six touring segments (based on travel activity over the past two years) reveals the divergent interests of the segments. Thus, Scenic Tour Seekers exhibit considerable interest in scenic tours, but were unlikely to have taken a wine tour, or a tour by air, train or boat. Wine Tour Enthusiasts took a wine tour, but were unlikely to have toured using their own personal vehicles. Personal Explorers clearly prefer to use their own vehicles when touring small towns, rural or coastal areas, but were also interested in wine tours. Ocean Cruise Enthusiasts exhibit a high interest in ocean cruises, but were also likely to have taken a scenic bus tour. Exotic Tour Seekers exhibit the most eclectic interests in touring activities, with a very high interest in tours by air, boat or train, as well as a high interest in Great Lakes or submarine cruises. Conversely, the Non-Touring Travellers exhibit low interest in all types of touring.

	Scenic Bus Tours	Wine Tours	Tours Using Personal Vehicles	Air, Train or Boat Cruises	Ocean Cruises	Great Lakes or Submarine Cruises
Wine Tour Enthusiasts	Average	Very High	Very Low	Average	Average	Average
Scenic Tour Seekers	Very High	Very Low	Low	Very Low	Low	Average
Personal Explorers	Low	High	Very High	Low	Low	Low
Exotic Tour Seekers	High	Average	Average	Very High	High	High
Ocean Cruise Enthusiasts	High	Very Low	Low	Low	Very High	Average
Non-Touring Travellers	Very Low	Very Low	Very Low	Very Low	Low	Very Low

Touring Segmentation
By Average Age & Household Income
Base: Adult Population (18 Plus) Who Took a Vacation in Last Two Years
Size of Circle Denotes Segment Size



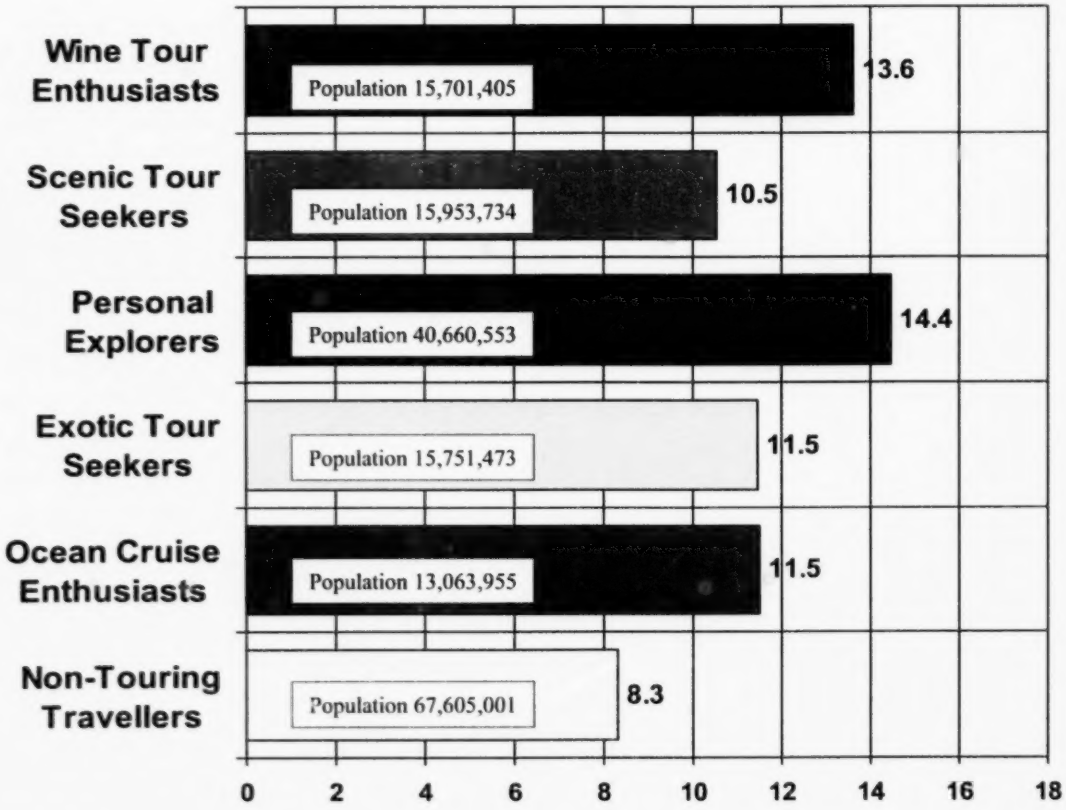
Touring Segmentation
By Education & Household Income
Base: Adult Population (18 Plus) Who Took a Vacation in Last Two Years
Size of Circle Denotes Segment Size



Touring Segmentation

Average Number of Trips Taken Last Two Years

Base: Adult Canadian/U.S. Population (18 Plus) Who Took a Vacation in Last Two Years



Travellers who took one or more tours in the past two years typically take more vacation trips than non-touring travellers. Personal Explorers (average of 14.4 trips) and Wine Tour Enthusiasts (average of 13.6 trips) took the greatest number of trips in the past two years, while Scenic Tour Seekers (average of 10.5 trips) took the fewest.

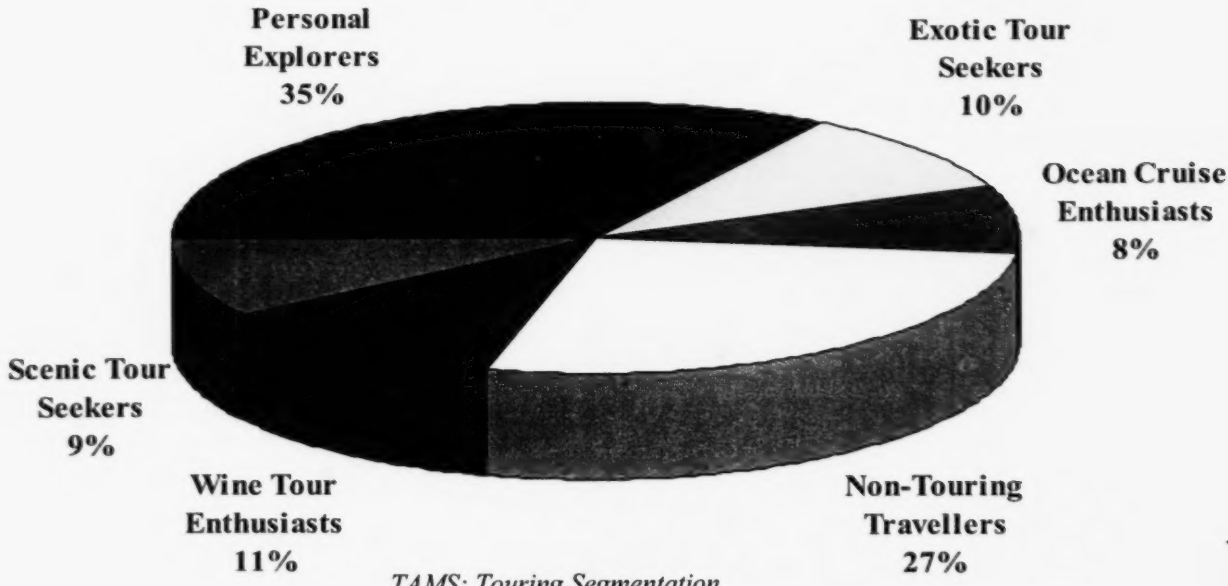
Technical Note

The estimated number of trips has been determined by summing up the number of times selected destinations have been visited in the last two years. Therefore, if the respondent visits multiple destinations on the same trip, it is counted as more than one trip, hence overestimating trips. On the other hand, the survey was restricted to people 18 and older, and therefore excludes trips taken by those 17 and under. This tends to underestimate the number of trips taken.

Adult Population (18 Plus) in Canada and United States Who Took Vacations

Incidence of Touring Segments
By Number of Trips Taken in Past Two Years

When the incidence of each segment is expressed as a percent of the total trips taken within the past two years, the percent of trips attributed to Personal Explorers (35 %) was much higher than the incidence of this segment in the overall travel market (24 %). The percentage of trips attributed to Wine Tour Enthusiasts (11 %) was also higher than their incidence in the travel market (9 %). Conversely, while the Non-Touring Travellers represent 40 % of the Canadian and U.S. travel market, they account for only 27 % of the trips taken during the past two years.

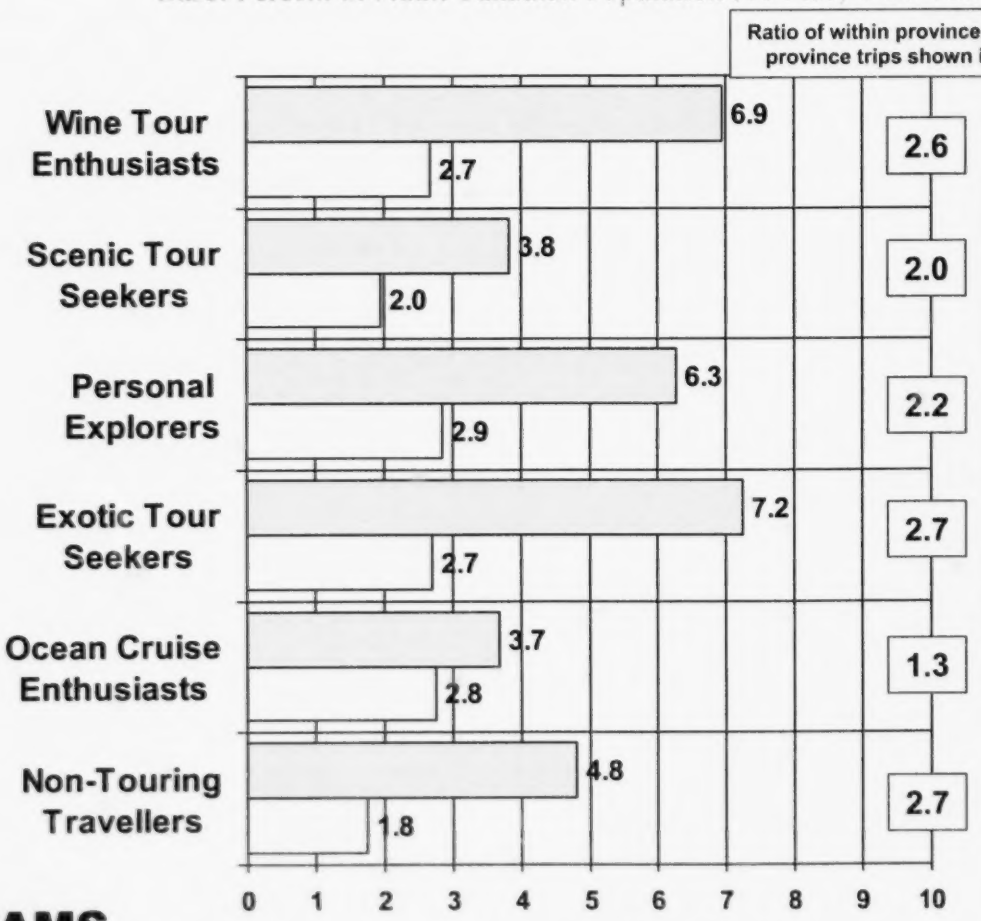


TAMS: Touring Segmentation

Touring Segmentation

Average Number of Canadian Trips Taken By Canadians During Past Two Years

Base: Percent of Adult Canadian Population (18 Plus) Who Took a Vacation in Last Two Years



Among Canadians, Wine Tour Enthusiasts, Personal Explorers and Exotic Tour Seekers took the greatest number of trips within their own province. Wine Tour Enthusiasts, Personal Explorers, Exotic Tour Seekers and Ocean Cruise Enthusiasts took the greatest number of trips to other provinces. In terms of the ratio of within province trips to trips taken to other provinces (shown in the inset box), Wine Tour Enthusiasts, Exotic Tour Seekers and the Non-Touring Travellers were the most likely to have taken a higher proportion of their trips within their own province. Ocean Cruise Enthusiasts take the lowest proportion of their trips within their own province and tend to prefer longer haul vacation travel.

☐ **Within Province**
☐ **To Other Provinces**

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TAMS: Touring Segmentation

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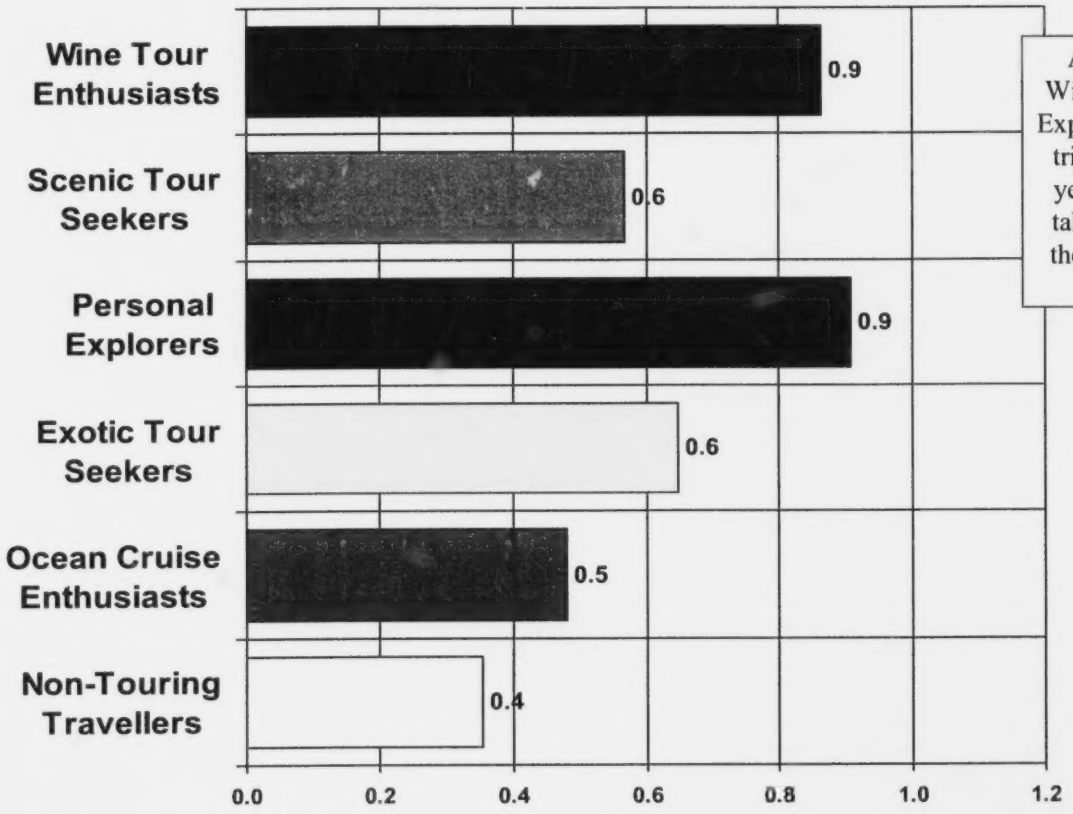
Touring Segmentation

Average Number of Canadian Trips Taken By Americans During Last Two Years

Base: Percent of Adult U.S. Population (18 Plus) Who Took a Vacation in Last Two Years



Among American travellers, the Wine Tour Enthusiasts and Personal Explorers took the greatest number of trips to Canada during the past two years. The average number of trips taken to Canada was lowest among the Non-Touring Travellers and the Ocean Cruise Enthusiasts.

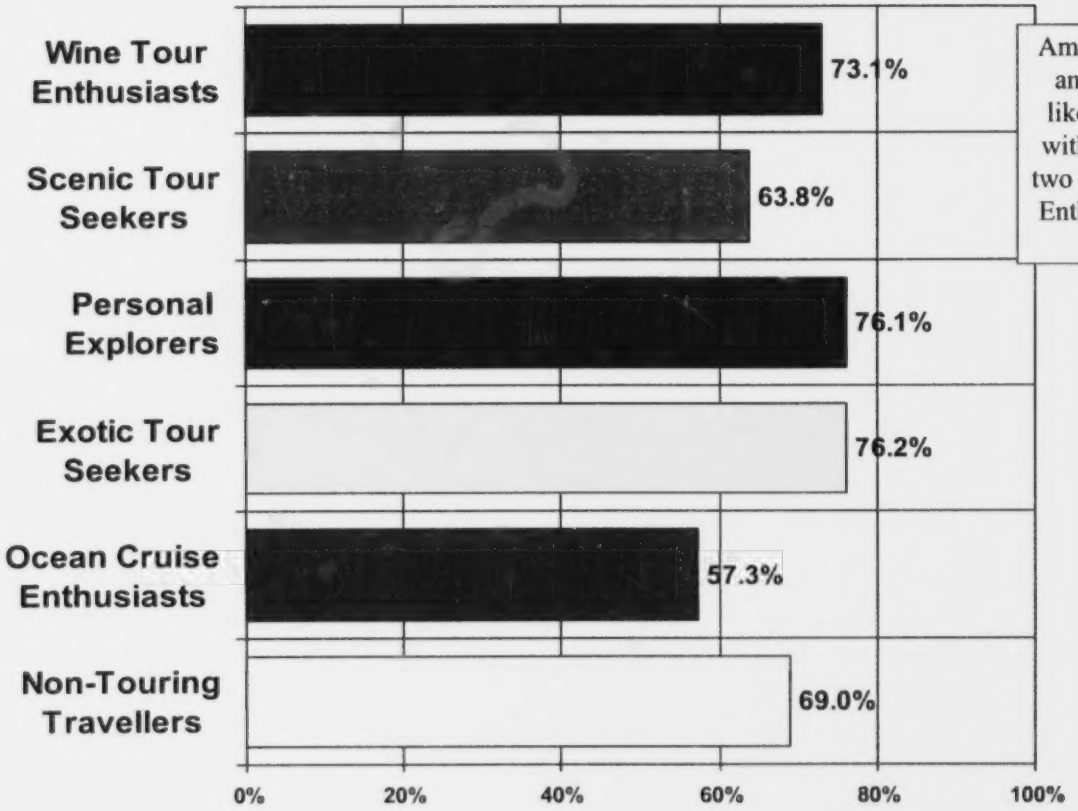
Technical Note

The estimated number of trips has been determined by summing up the number of times selected destinations have been visited in the last two years. Therefore, if the respondent visits multiple destinations on the same trip, it is counted as more than one trip, hence overestimating trips. On the other hand, the survey was restricted to people 18 and older and therefore excludes trips taken by those 17 and under. This tends to underestimate the number of trips taken.

Touring Segmentation: Canada

Percent Who Were "Very Likely" to Take a Canadian Trip in Next Two Years

Base: Percent of Adult Canadian Population (18 Plus) Who Took a Vacation in Last Two Years

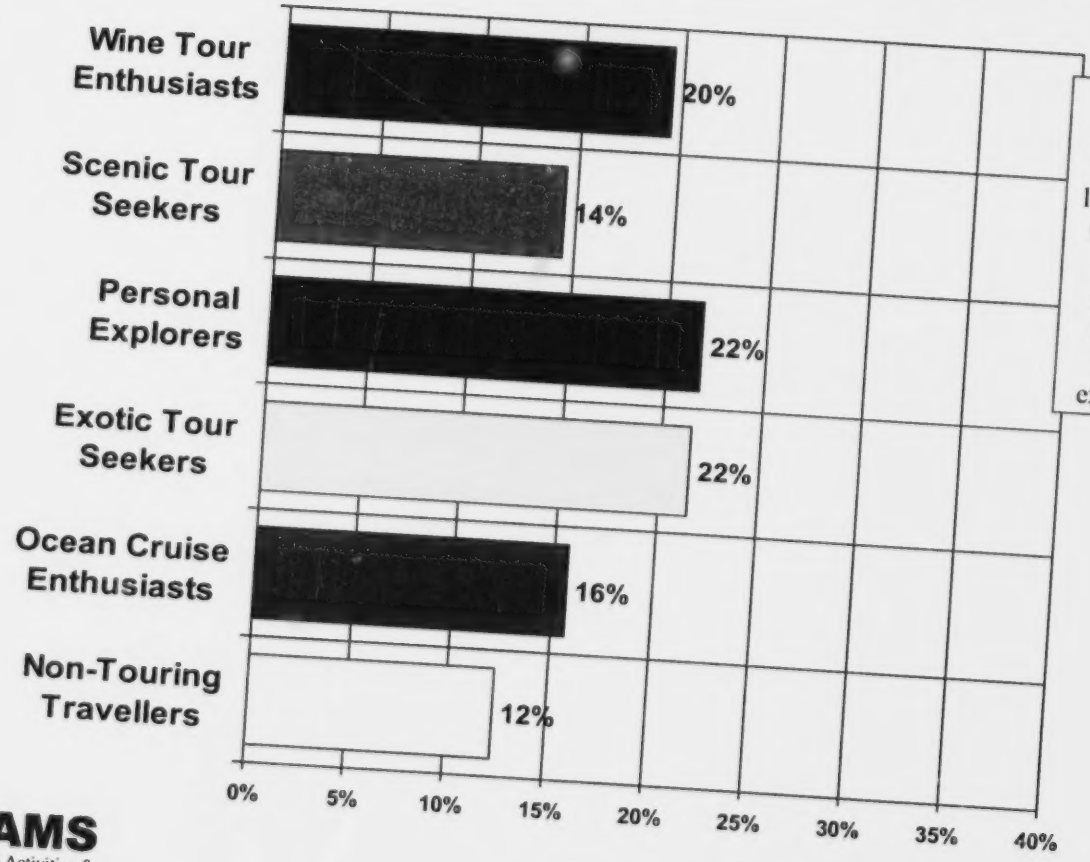


Among Canadians, the Personal Explorers and Exotic Tour Seekers were the most like to express an interest in taking a trip within Canada over the course of the next two years. On the other hand, Ocean Cruise Enthusiasts were the least likely to exhibit an interest in domestic travel.

Touring Segmentation: United States

Percent Who Were "Very Likely" to Take a Canadian Trip in Next Two Years

Base: Percent of Adult U.S. Population (18 Plus) Who Took a Vacation in Last Two Years



Among Americans, Wine Tour Enthusiasts, Personal Explorers and Exotic Tour Seekers were the most likely to exhibit an interest in taking a trip to Canada over the course of the next two years. These segments exhibit above average potential for Canadian travel. The Non-Touring Travellers were the least likely to exhibit an interest in a Canadian trip.

TAMS
Travel Activities & Motivation Survey

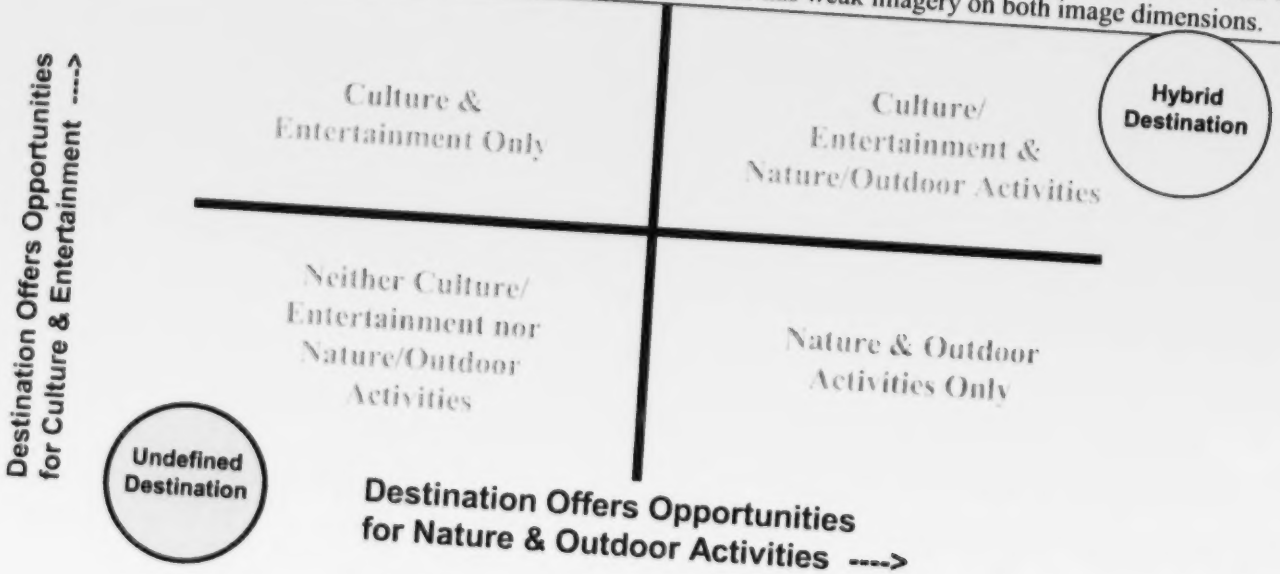
TAMS: Touring Segmentation

Lang RESEARCH

Destination Image Mapping

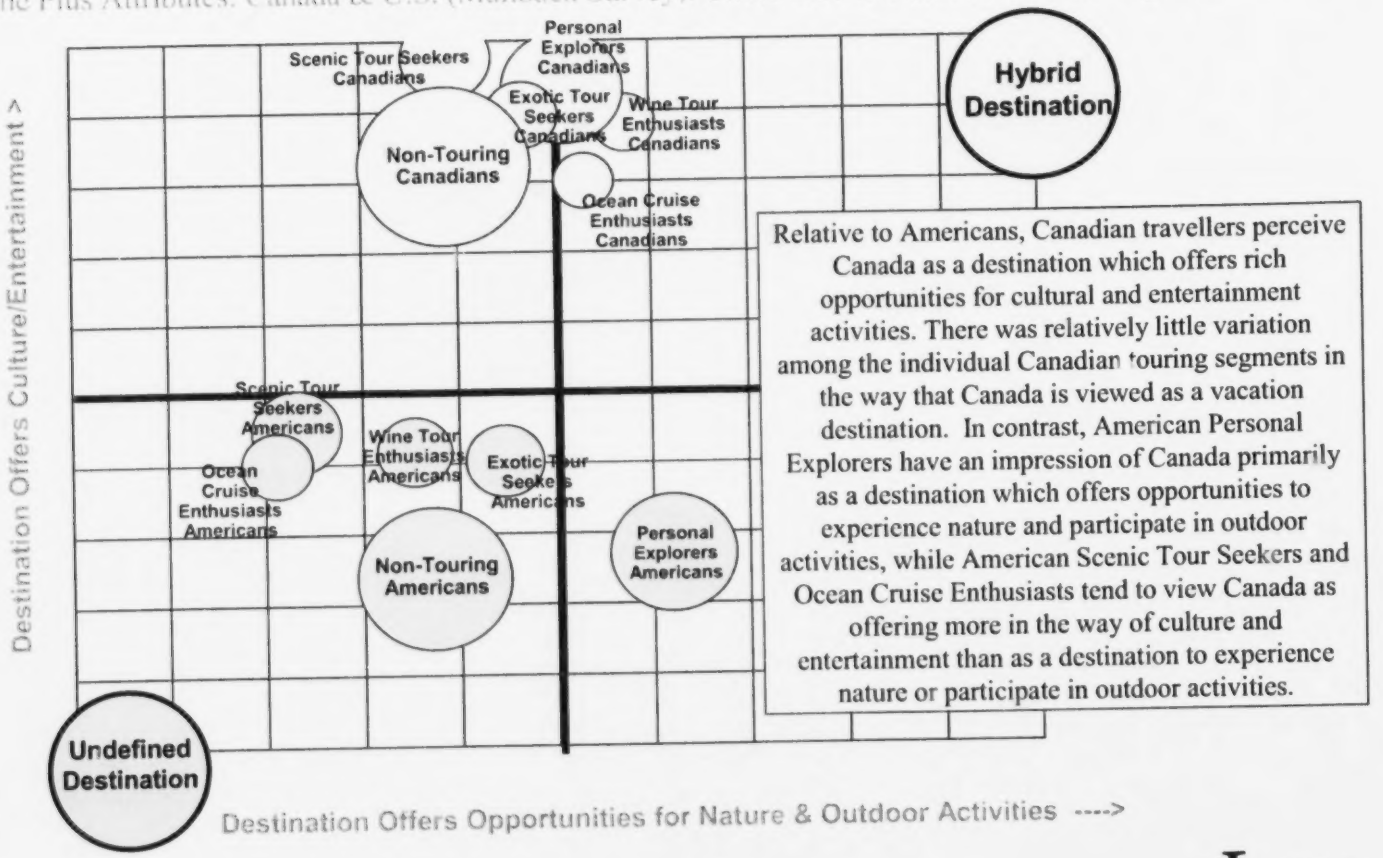
- Technical Explanation -

Respondents were asked to assess the image of Canada and Ontario on a 10-point rating scale for 25 image attributes. These ratings were factor analysed to identify general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellent opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in the upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.



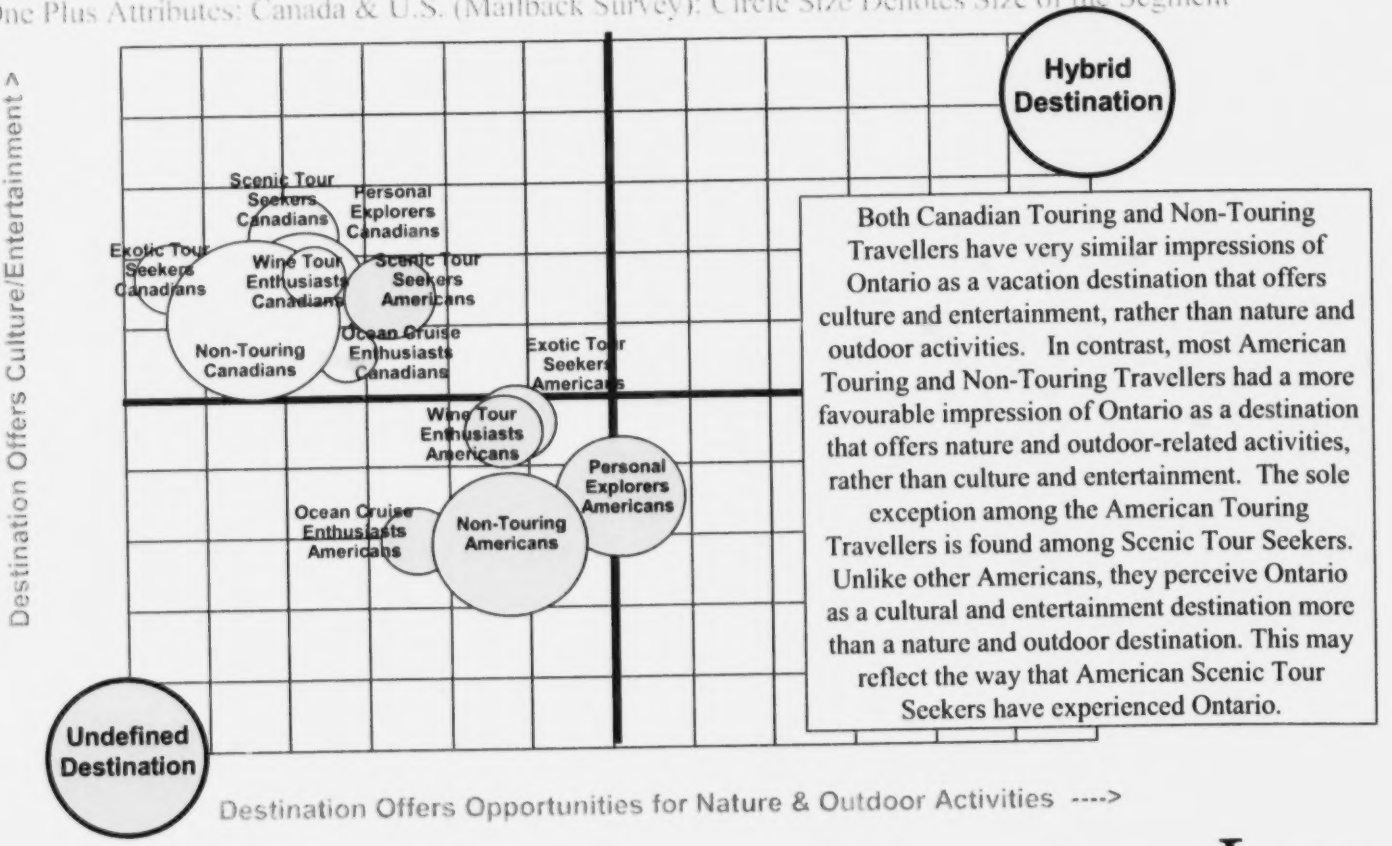
Vacation Imagery of Canada
By Touring Segments

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



Vacation Imagery of Ontario
By Touring Segments

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



Both Canadian Touring and Non-Touring Travellers have very similar impressions of Ontario as a vacation destination that offers culture and entertainment, rather than nature and outdoor activities. In contrast, most American Touring and Non-Touring Travellers had a more favourable impression of Ontario as a destination that offers nature and outdoor-related activities, rather than culture and entertainment. The sole exception among the American Touring Travellers is found among Scenic Tour Seekers. Unlike other Americans, they perceive Ontario as a cultural and entertainment destination more than a nature and outdoor destination. This may reflect the way that American Scenic Tour Seekers have experienced Ontario.

Section Three

Wine Tour Enthusiasts

Detailed Segment Profile

Wine Tour Enthusiasts

Wine Tour Enthusiasts account for 8.7 % of Canadian travellers and 9.6 % of American travellers. They are over-represented among the Affluent Mature and Senior Couples, Affluent Young Couples and Affluent Mature Singles, and report above average household incomes and levels of education.

Wine Tour Enthusiasts have travelled frequently over the past two years, both domestically and internationally. They are also more likely than the average traveller to be planning a trip in Canada over the next two years (73% versus 68%). Moreover, they represent an important off-peak travel market since they are 25 % more likely than the typical traveller to take a trip during the low seasons.

Canadian Wine Tour Enthusiasts seem very aware of the country's main wine regions, and were more likely than the average Canadian traveller to have visited Ontario and British Columbia. However, American Wine Tour Enthusiasts were no more likely to have visited Ontario and British Columbia than the average American visitor to Canada, but were slightly more likely to have visited Quebec.

Wine Tour Enthusiasts undertake vacation travel primarily for exploration and personal indulgence. They are likely to patronize the high arts (ballet, opera), seek out natural attractions, and appear drawn to garden attractions. Satisfying their personal indulgences while on vacation trips goes beyond enjoying food and wine, and includes shopping and casino gambling. They also prefer luxury accommodations (resort, B&B, spa or gourmet restaurant).

Wine Tour Enthusiasts participate in a wide variety of outdoor activities while on vacation including golfing, sailing, canoeing, kayaking and hiking. Along with wine tours, Wine Tour Enthusiasts showed above average interest in other touring activities, such as guided country or city tours, scenic day tours by air, and ocean cruises.

Wine Tour Enthusiasts tended to consult a wide array of information sources when planning their vacations. As such, the most efficient channels for reaching this segment are travel magazines, travel guides (such as Fodor's), direct mail travel information, and specialized trade or travel shows. Wine Tour Enthusiasts were also more likely than others to use the Internet to research and book their vacation travel.

Wine Tour Enthusiasts were also more likely than the average traveller to use travel packages for both brief and longer vacations. In fact, 40 % have used travel packages for at least some of their longer vacations during the past two years.

Wine Tour Enthusiasts

Key Demographic Characteristics

Wine Tour Enthusiasts represent 6.7 % of Canadian Travellers and 9.6 % of American Travellers. They tend to be middle-aged and older, with high levels of household income and education. While most are still working, a significant minority is retired. In terms of life cycle stage and household composition, older people without children (Mature Couples, Senior Couples, Senior Singles) and younger couples without children (Young Couples) are over-represented among Wine Tour Enthusiasts.

Percent of Total Population:	5.9 % [Canada]; 8.5 % [United States]
Percent of Travellers:	6.7 % [Canada]; 9.6 % [United States]
Number of Individuals in Segment:	1,167,300 [Canada]; 14,535,100 [United States]
Average Age/Dominant Age Range:	47.1 years old; 36 Plus (70.2 %)
Dominant Life Cycle Stages:	Young Couples [Index=128; 8.4 %] Mature Couples [Index=124; 24.8 %] Senior Singles [Index=126; 7.9 %] Senior Couple [Index=123; 8.1 %]
Household Income:	$63,800; 27.8 % HHI of $80K or more
Percent with Post-Secondary Education:	53.9 % University/College; 69.6 % Advanced Degrees
Dominant Occupation Status:	55.1 % Employed; 22.2 % Retired; 12.0 % Self-employed

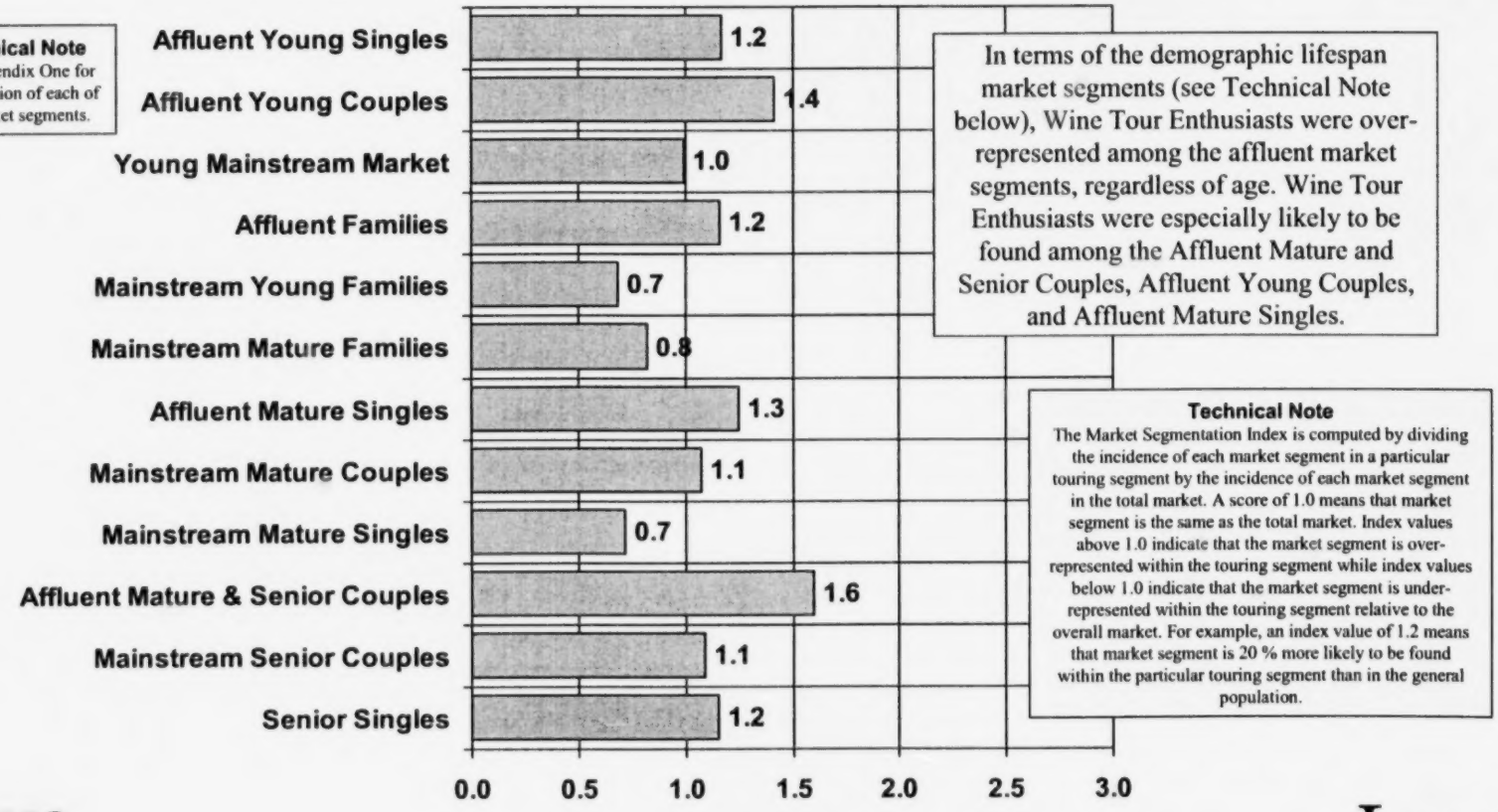
Technical Note
See Appendix One for a description of each of the life cycle stages.

Touring Segmentation: Market Segment Indexing

Wine Tour Enthusiasts

Distribution of Market Segments in Wine Tour Enthusiasts Segment Divided By Distribution of Market Segments in Total Population
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



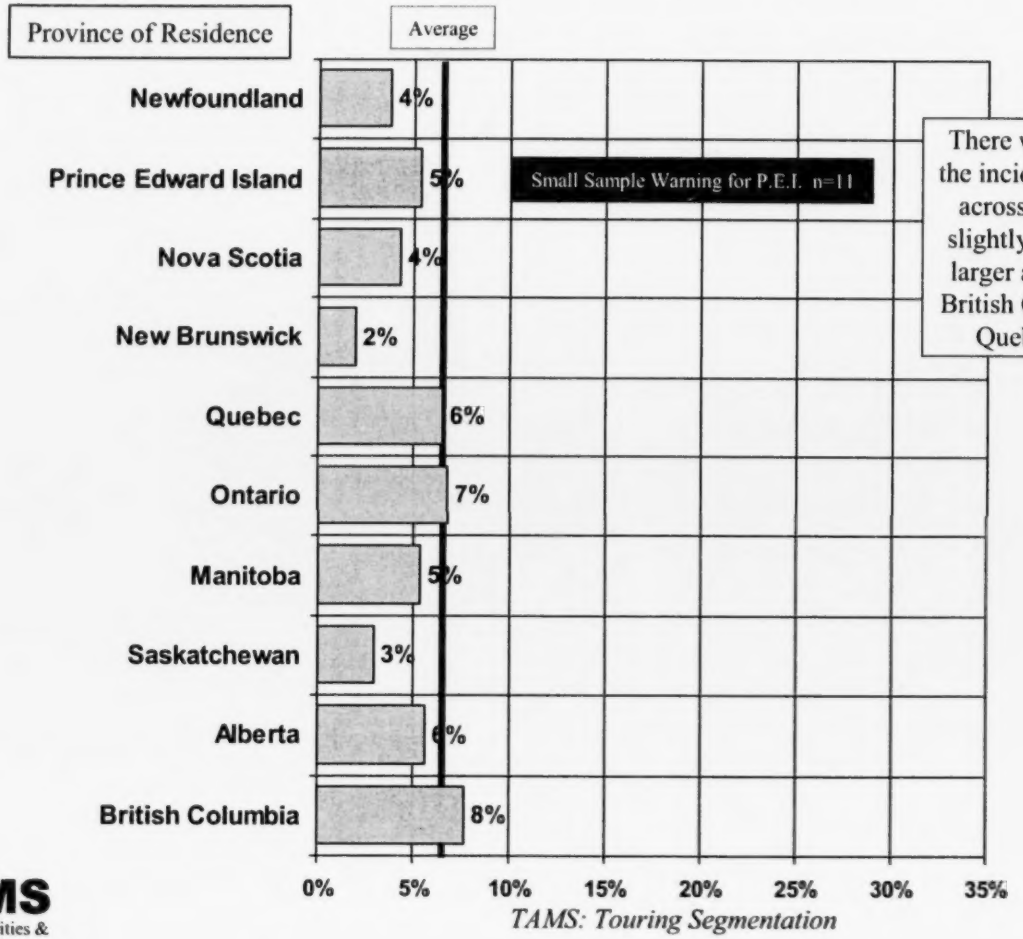
In terms of the demographic lifespan market segments (see Technical Note below), Wine Tour Enthusiasts were over-represented among the affluent market segments, regardless of age. Wine Tour Enthusiasts were especially likely to be found among the Affluent Mature and Senior Couples, Affluent Young Couples, and Affluent Mature Singles.

Technical Note
The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular touring segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the touring segment while index values below 1.0 indicate that the market segment is under-represented within the touring segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to be found within the particular touring segment than in the general population.

Touring Segment Incidence in Canada

Wine Tour Enthusiasts: By Province

Base: Adult (18 Plus) Canadian Population Who Took a Trip or Plans to Take a Trip in Past/Next Two Years



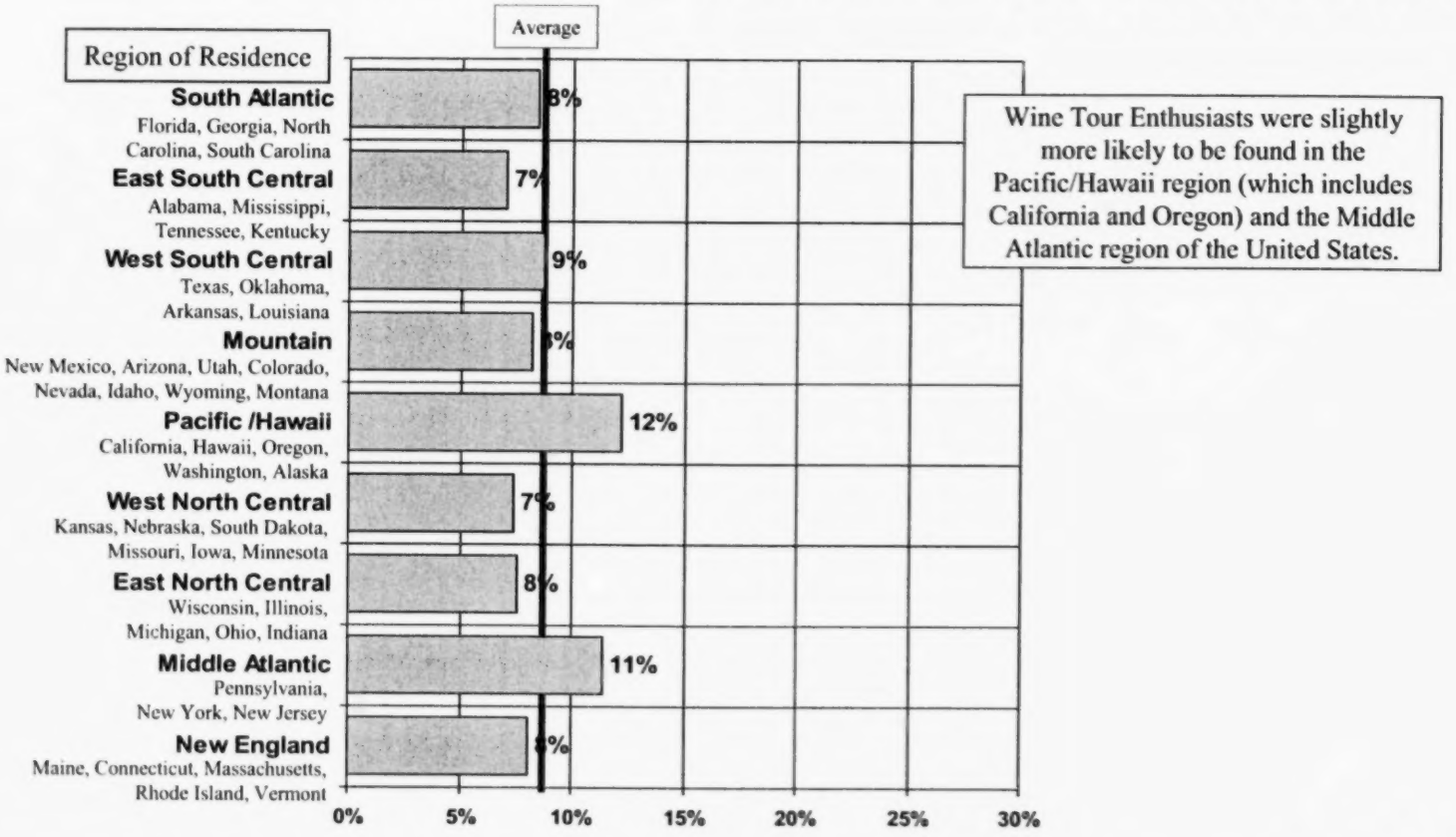
There was relatively little variation in the incidence of Wine Tour Enthusiasts across Canada. However, they were slightly more likely to be found in the larger and more affluent provinces of British Columbia, Alberta, Ontario and Quebec, than in other provinces.

TAMS: Touring Segmentation

Touring Segment Incidence in United States

Wine Tour Enthusiasts: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took a Trip or Plans to Take a Trip in Past/Next Two Years

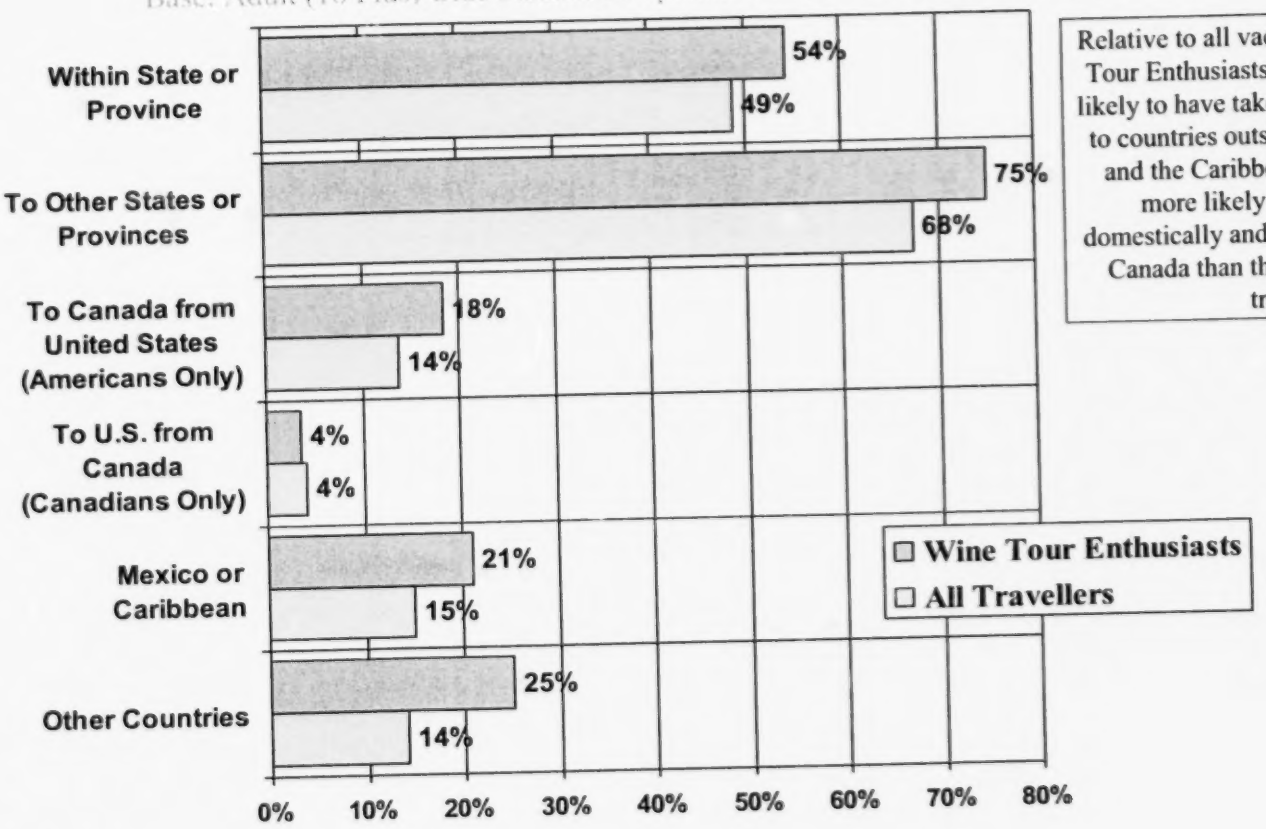


Wine Tour Enthusiasts were slightly more likely to be found in the Pacific/Hawaii region (which includes California and Oregon) and the Middle Atlantic region of the United States.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Wine Tour Enthusiasts

Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years

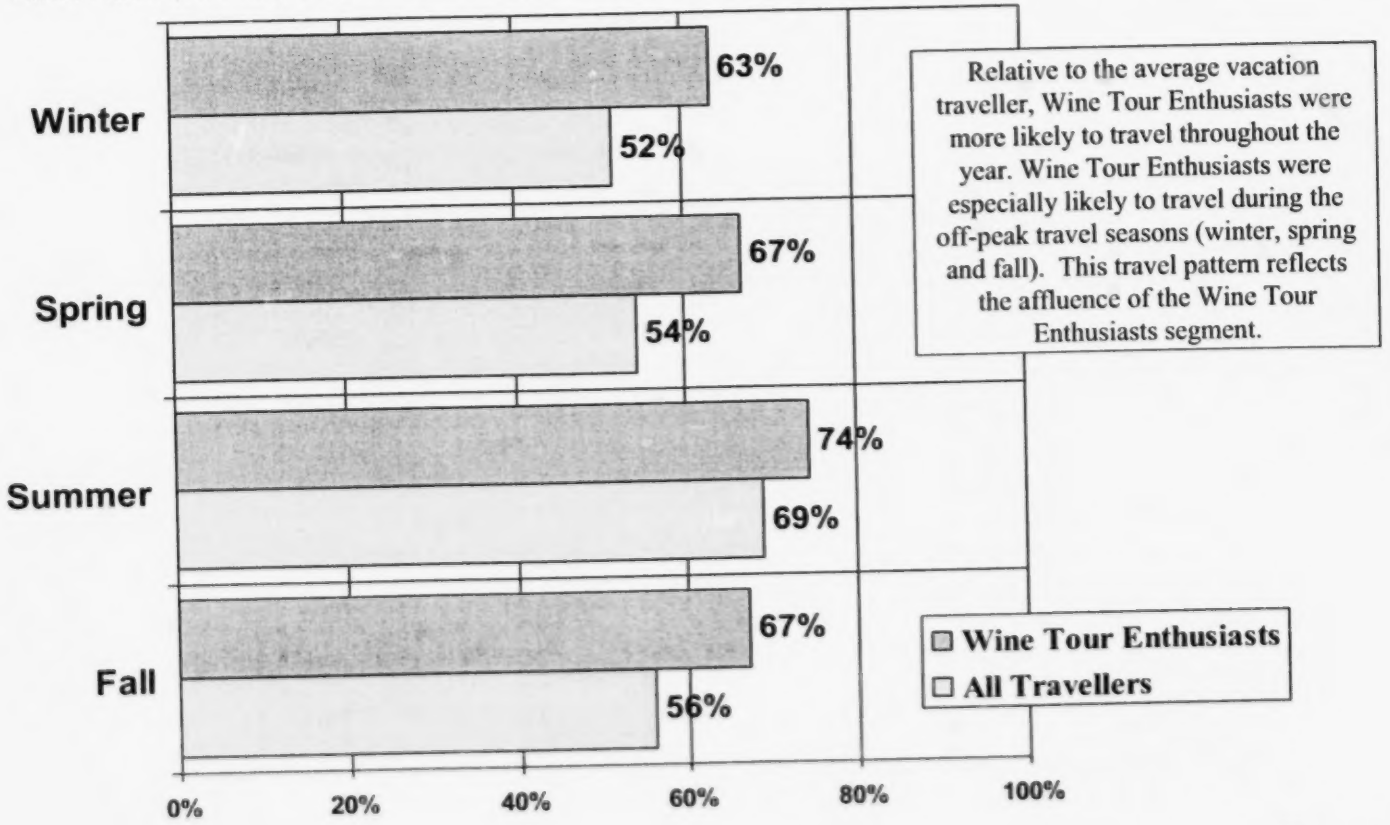


Relative to all vacation travellers, Wine Tour Enthusiasts were almost twice as likely to have taken an international trip to countries outside of North America and the Caribbean. They were also more likely to have travelled domestically and to have taken a trip to Canada than the average American traveller.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past Two Years

Wine Tour Enthusiasts: Percent Taking Trip Each Season

Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years

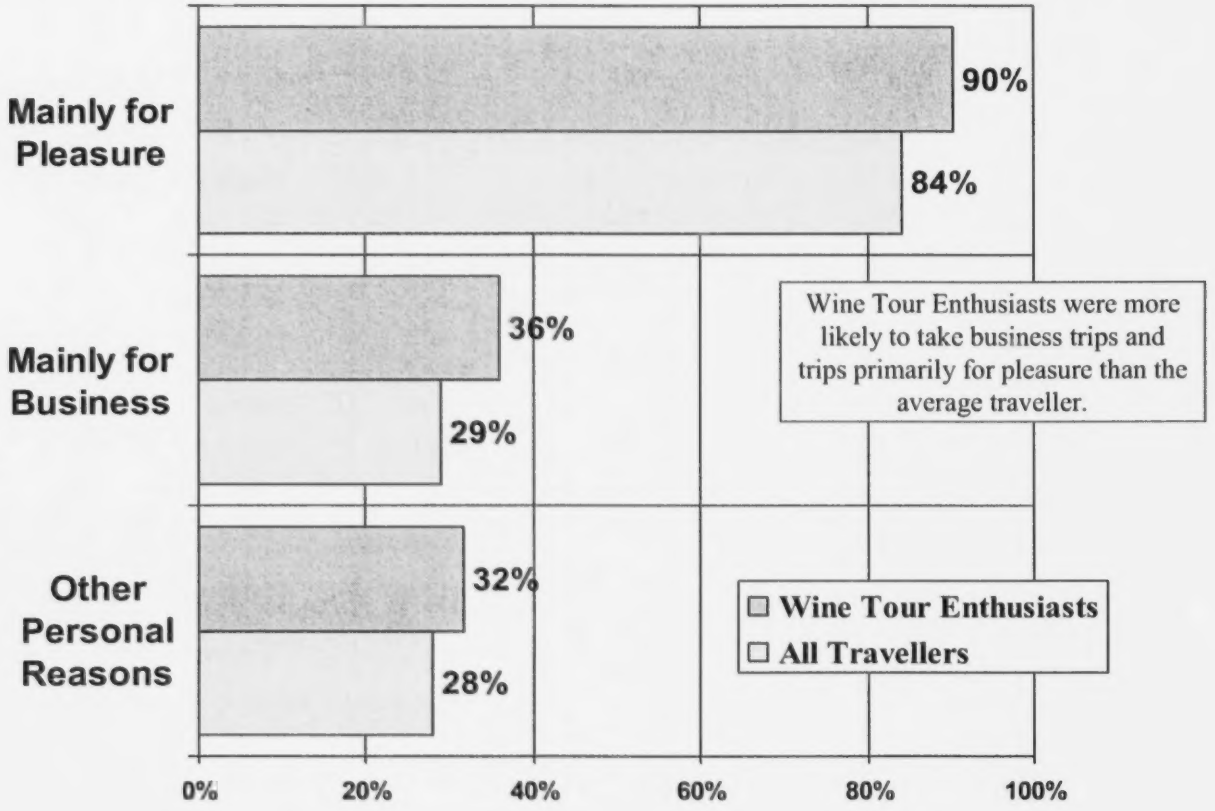


Relative to the average vacation traveller, Wine Tour Enthusiasts were more likely to travel throughout the year. Wine Tour Enthusiasts were especially likely to travel during the off-peak travel seasons (winter, spring and fall). This travel pattern reflects the affluence of the Wine Tour Enthusiasts segment.

Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past Two Years

Wine Tour Enthusiasts: Percent Taking Trip for Various Reasons

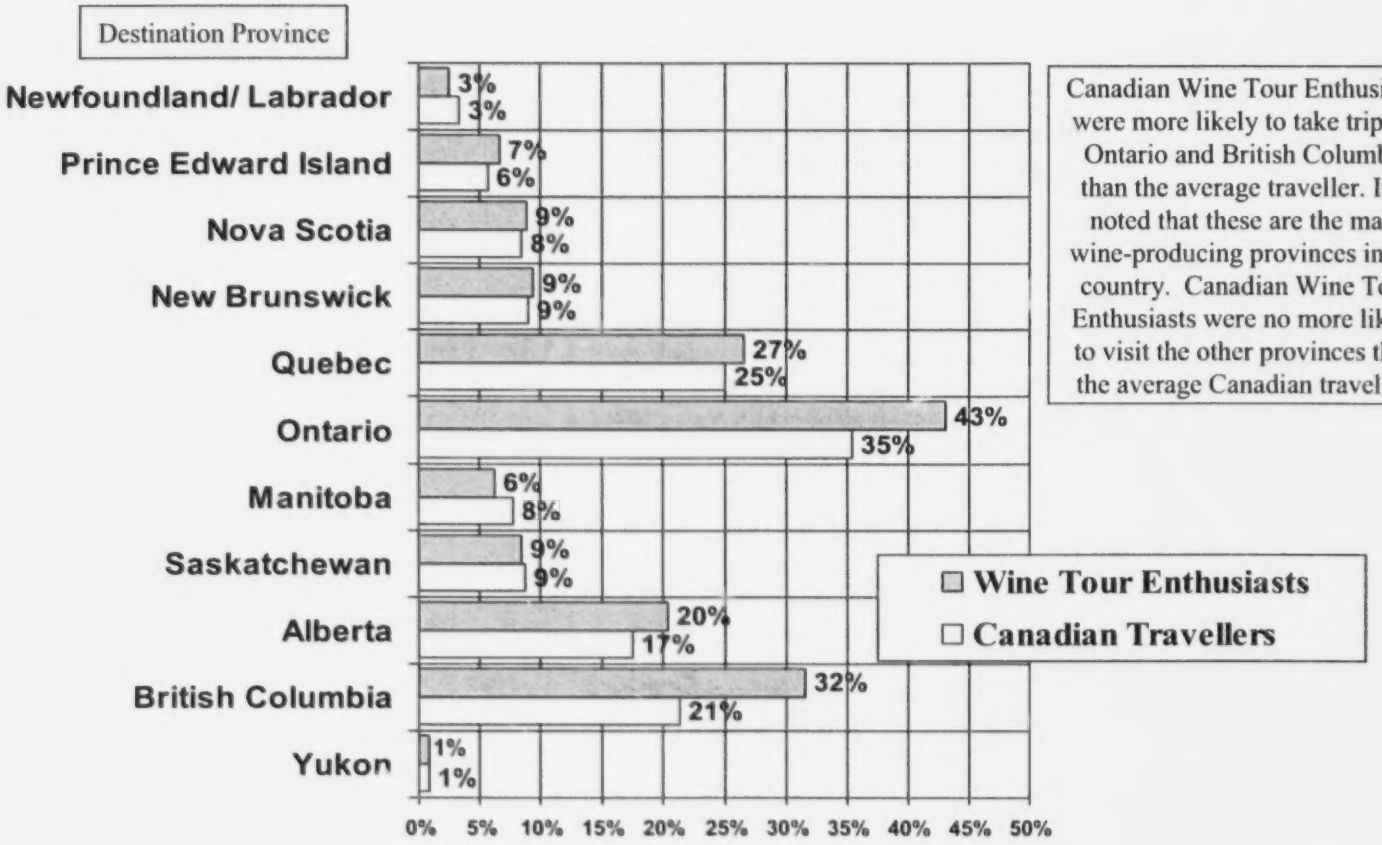
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past Two Years

Wine Tour Enthusiasts: Percent of Canadians Taking a Trip to Various Provinces

Base: Adult (18 Plus) Canadian Population Who Took a Vacation Trip and Trip Within Canada in the Past Two Years

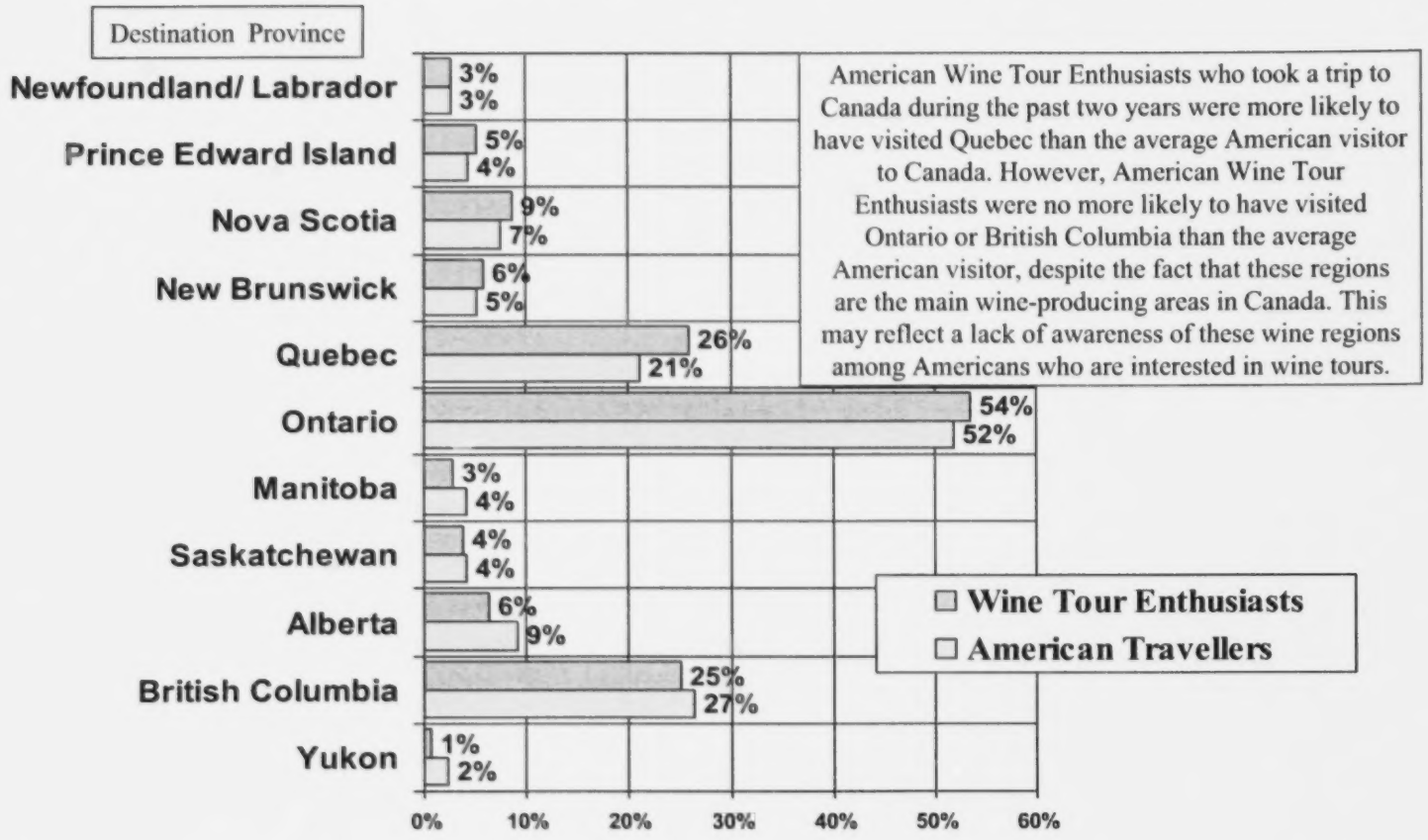


Canadian Wine Tour Enthusiasts were more likely to take trips to Ontario and British Columbia than the average traveller. It is noted that these are the main wine-producing provinces in the country. Canadian Wine Tour Enthusiasts were no more likely to visit the other provinces than the average Canadian traveller.

Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past Two Years

Wine Tour Enthusiasts: Percent of Americans Taking a Trip to Various Provinces

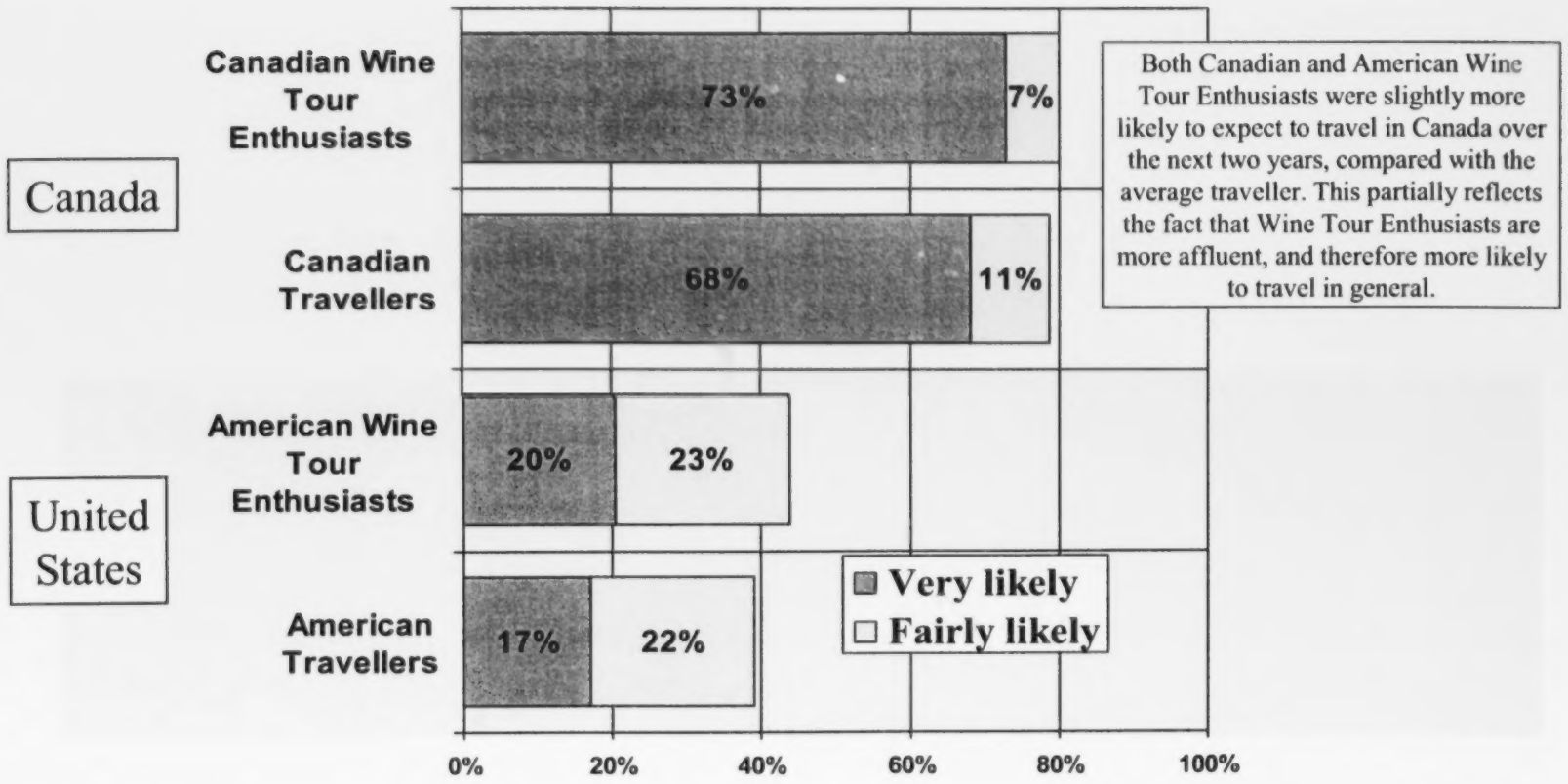
Base: Adult (18 Plus) U.S. Population Who Took a Vacation Trip and a Trip to Canada in the Past Two Years



Touring Segmentation

Wine Tour Enthusiasts: Intentions to Travel Within/To Canada Next Two Years

Base: Adult Population (18 Plus) Who Took a Vacation Trip in Last Two Years

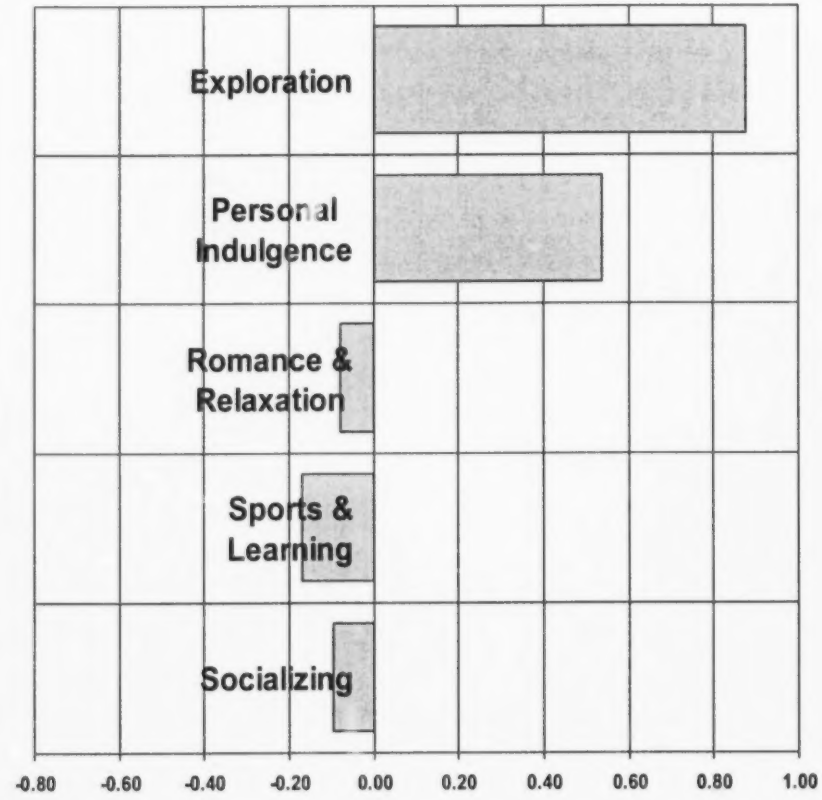


Both Canadian and American Wine Tour Enthusiasts were slightly more likely to expect to travel in Canada over the next two years, compared with the average traveller. This partially reflects the fact that Wine Tour Enthusiasts are more affluent, and therefore more likely to travel in general.

General Vacation Experiences Sought During Pleasure Travel in the Past Two Years

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Wine Tour Enthusiasts tend to approach vacation travel as an opportunity to explore (see natural wonders, visit museums and art galleries) and to indulge themselves (e.g., fine dining, nightlife). Marketing to Wine Tour Enthusiasts should emphasize the opportunities to experience culture and entertainment, as well as enjoying "the good life." Other types of vacation experiences (e.g., romance and relaxation, socializing, participating in a sports activity or learning) were less likely to be pursued by this segment.

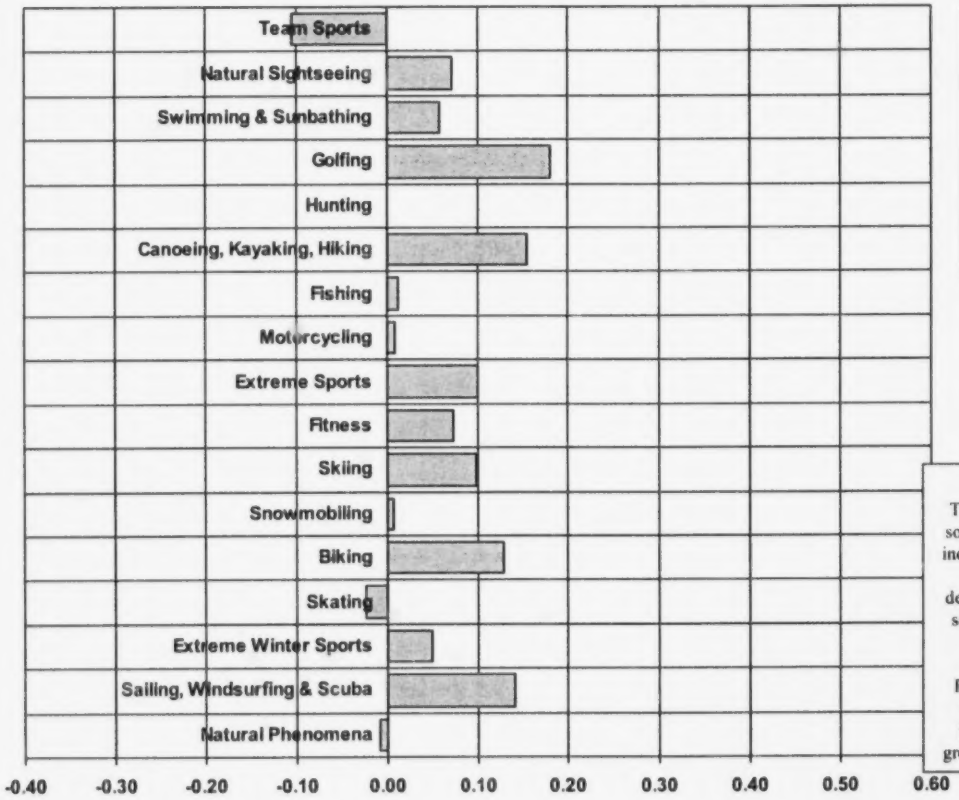
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past Two Years

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Wine Tour Enthusiasts were quite active in several outdoor activities while travelling during the past two years, including golfing, canoeing, kayaking, hiking, sailing, and biking. The wide range of outdoor activities pursued by Wine Tour Enthusiasts reflects the wide age range represented within this segment.

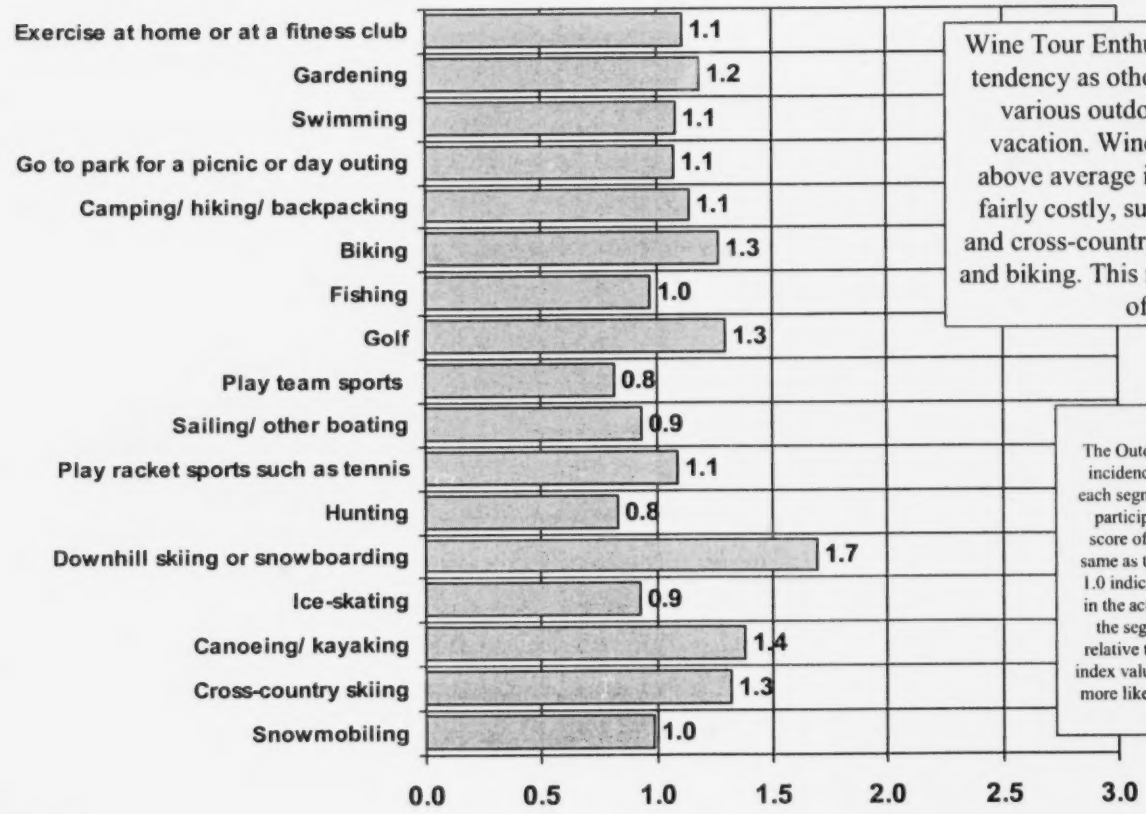
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Wine Tour Enthusiasts had roughly the same tendency as other travellers to participate in various outdoor activities while not on vacation. Wine Tour Enthusiasts display above average interest in activities that are fairly costly, such as skiing (both downhill and cross-country), canoeing, kayaking, golf, and biking. This reflects the relative affluence of this segment.

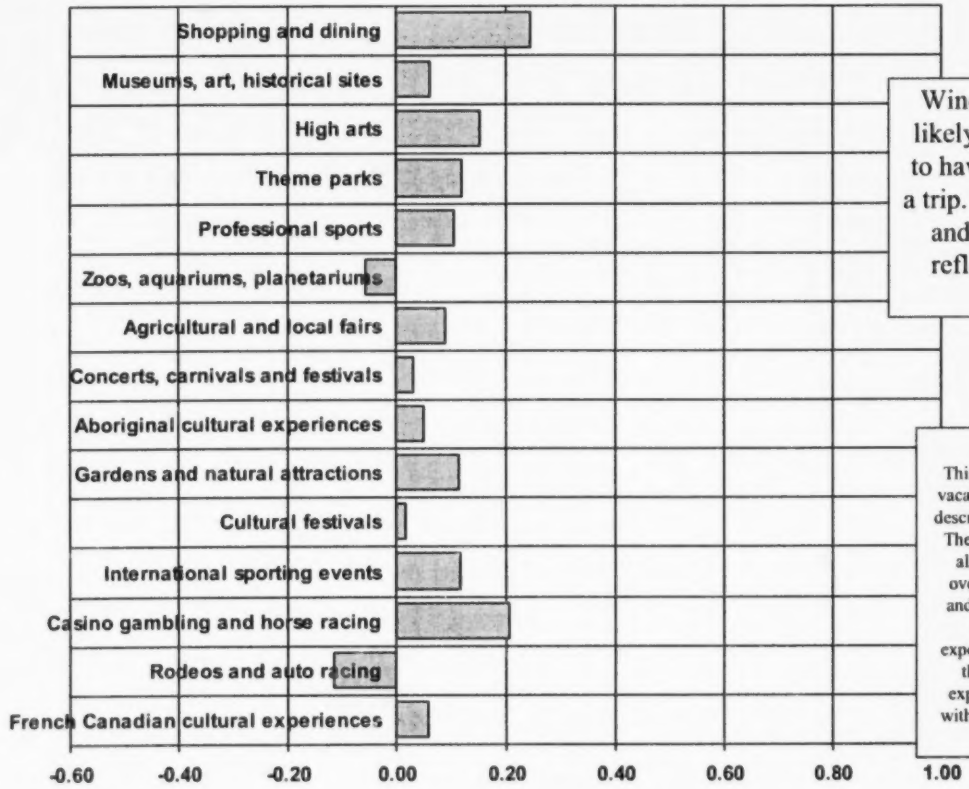
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to participate in a given activity than the total market of vacation travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past Two Years

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Wine Tour Enthusiasts were more likely than other vacation travellers to have shopped and dined while on a trip. The appeal of casino gambling and horse racing to this segment reflects their interest in personal indulgence.

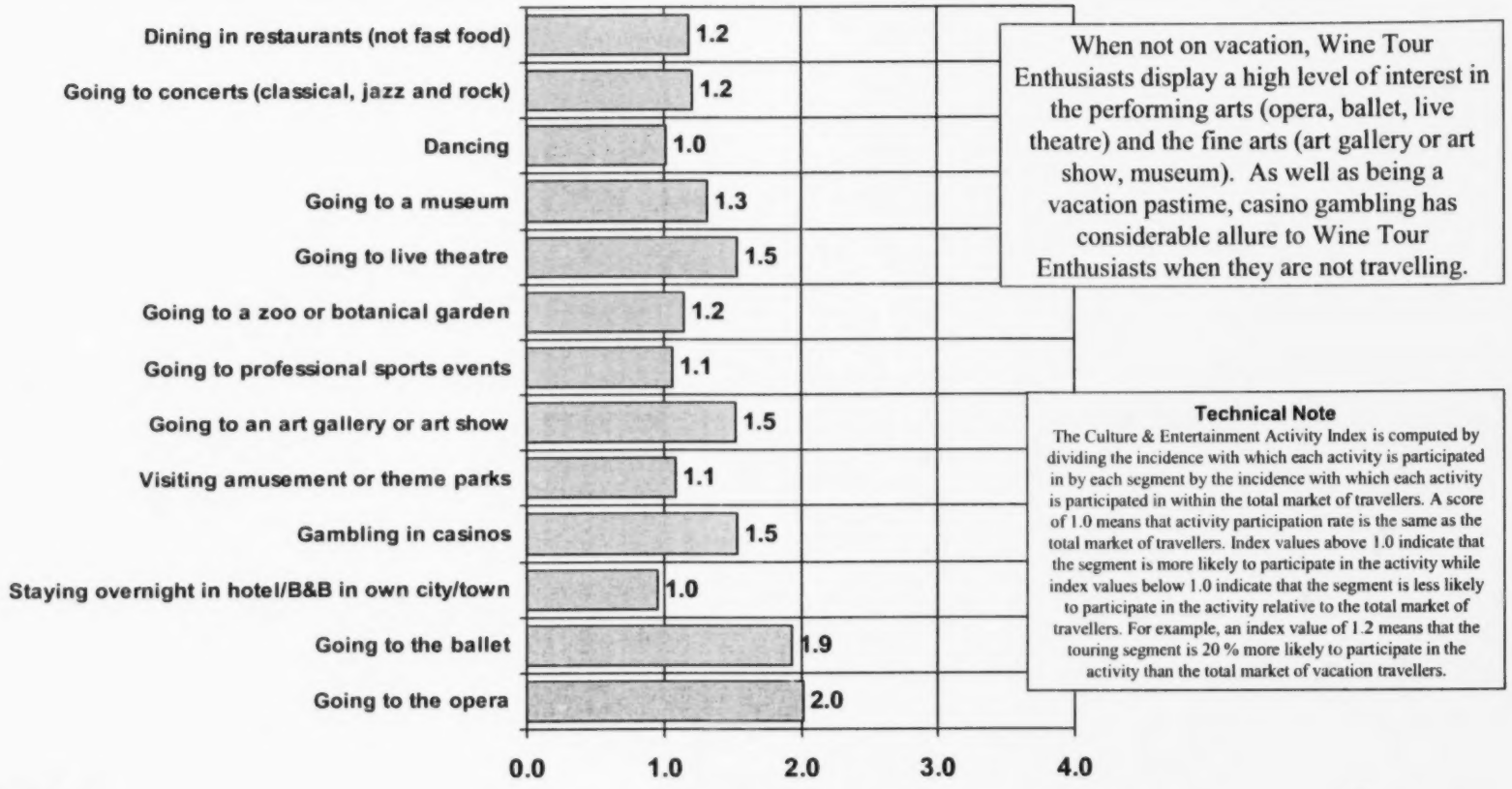
Technical Note

This analysis is based on a factor analysis of the Culture and Entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



When not on vacation, Wine Tour Enthusiasts display a high level of interest in the performing arts (opera, ballet, live theatre) and the fine arts (art gallery or art show, museum). As well as being a vacation pastime, casino gambling has considerable allure to Wine Tour Enthusiasts when they are not travelling.

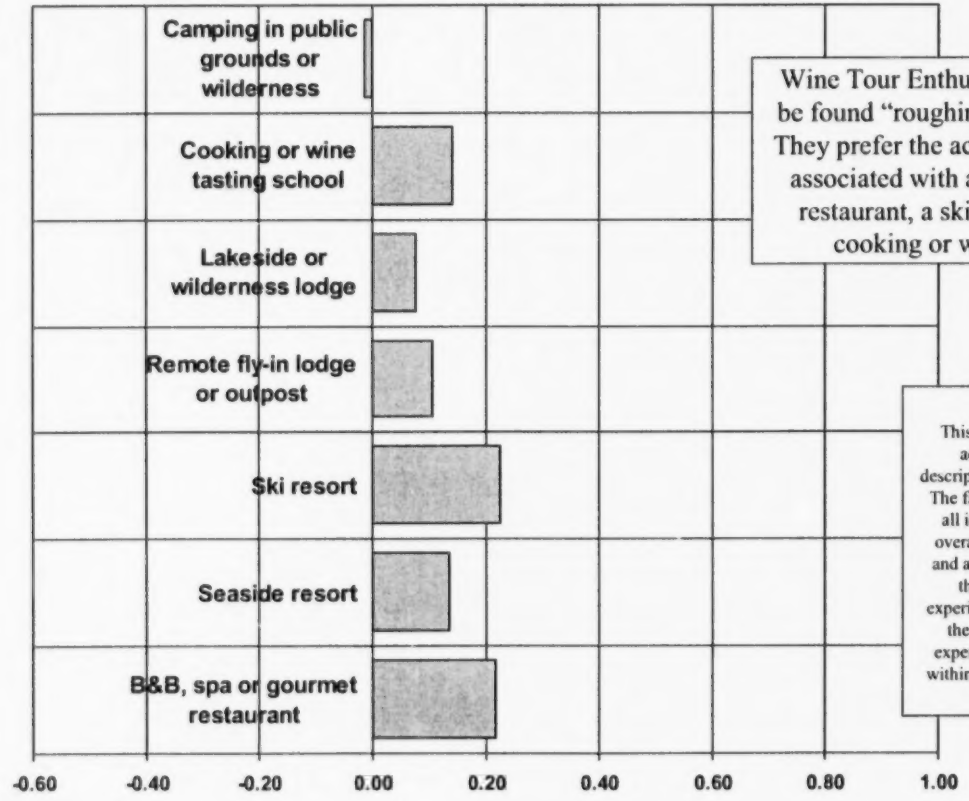
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the touring segment is 20 % more likely to participate in the activity than the total market of vacation travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past Two Years

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Wine Tour Enthusiasts were not likely to be found "roughing it" when on vacation. They prefer the accommodation amenities associated with a B&B, spa or gourmet restaurant, a ski or seaside resort, or a cooking or wine tasting school.

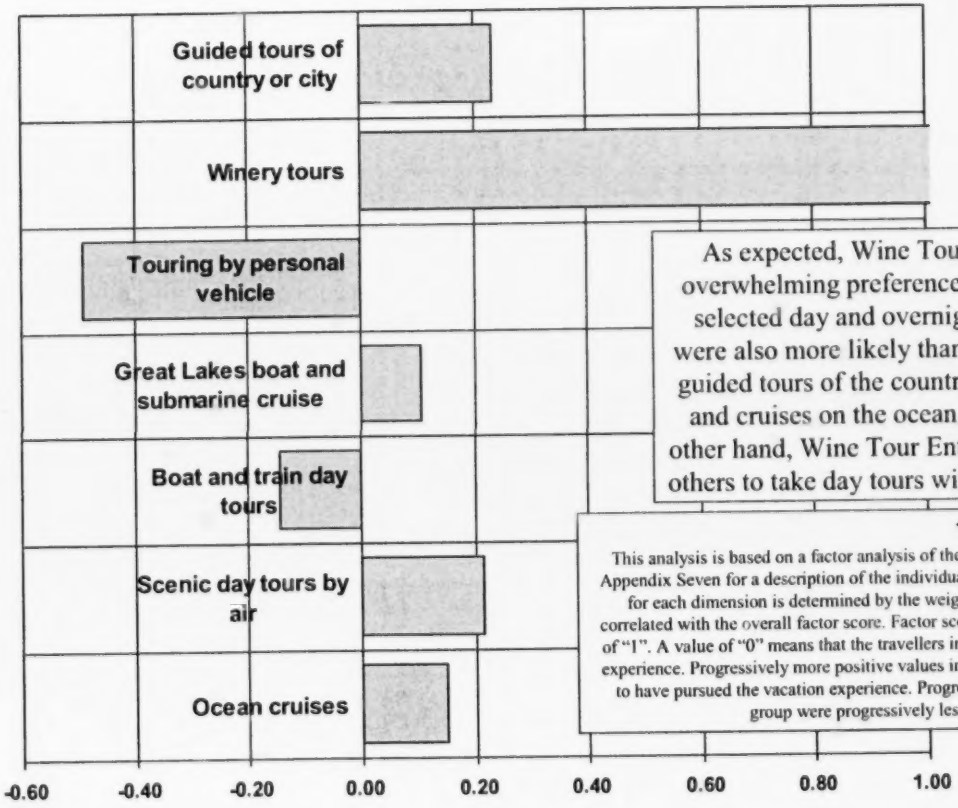
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past Two Years

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



As expected, Wine Tour Enthusiasts displayed an overwhelming preference for winery tours among the selected day and overnight touring activities. They were also more likely than the average traveller to take guided tours of the country or city, scenic tours by air, and cruises on the ocean or the Great Lakes. On the other hand, Wine Tour Enthusiasts were less likely than others to take day tours with their own personal vehicle.

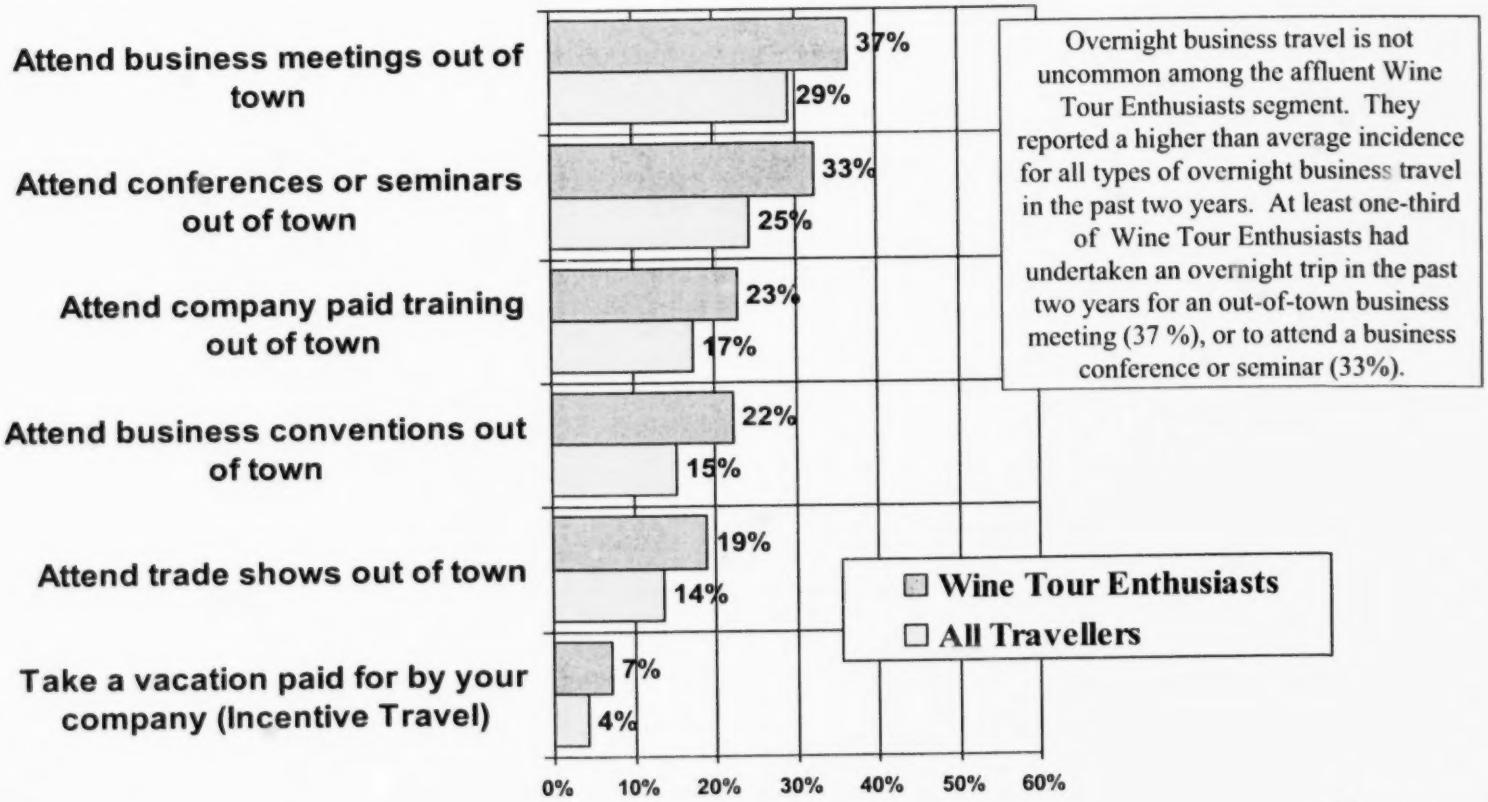
Technical Note

This analysis is based on a factor analysis of the same day and overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Percent Taking Various Types of Overnight Business Trip During Past Two Years

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

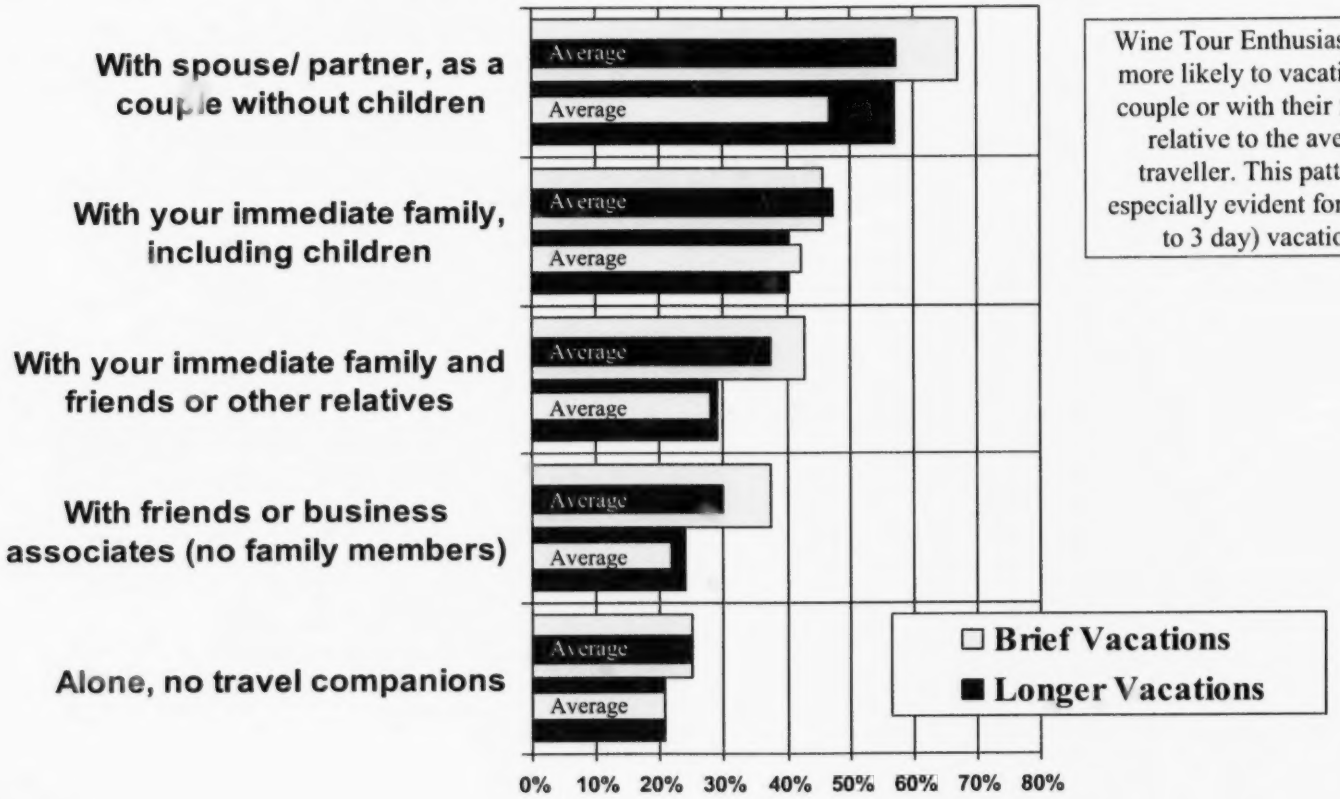


Overnight business travel is not uncommon among the affluent Wine Tour Enthusiasts segment. They reported a higher than average incidence for all types of overnight business travel in the past two years. At least one-third of Wine Tour Enthusiasts had undertaken an overnight trip in the past two years for an out-of-town business meeting (37 %), or to attend a business conference or seminar (33%).

Composition of Travel Party for Brief and Longer Trips During Past Two Years

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

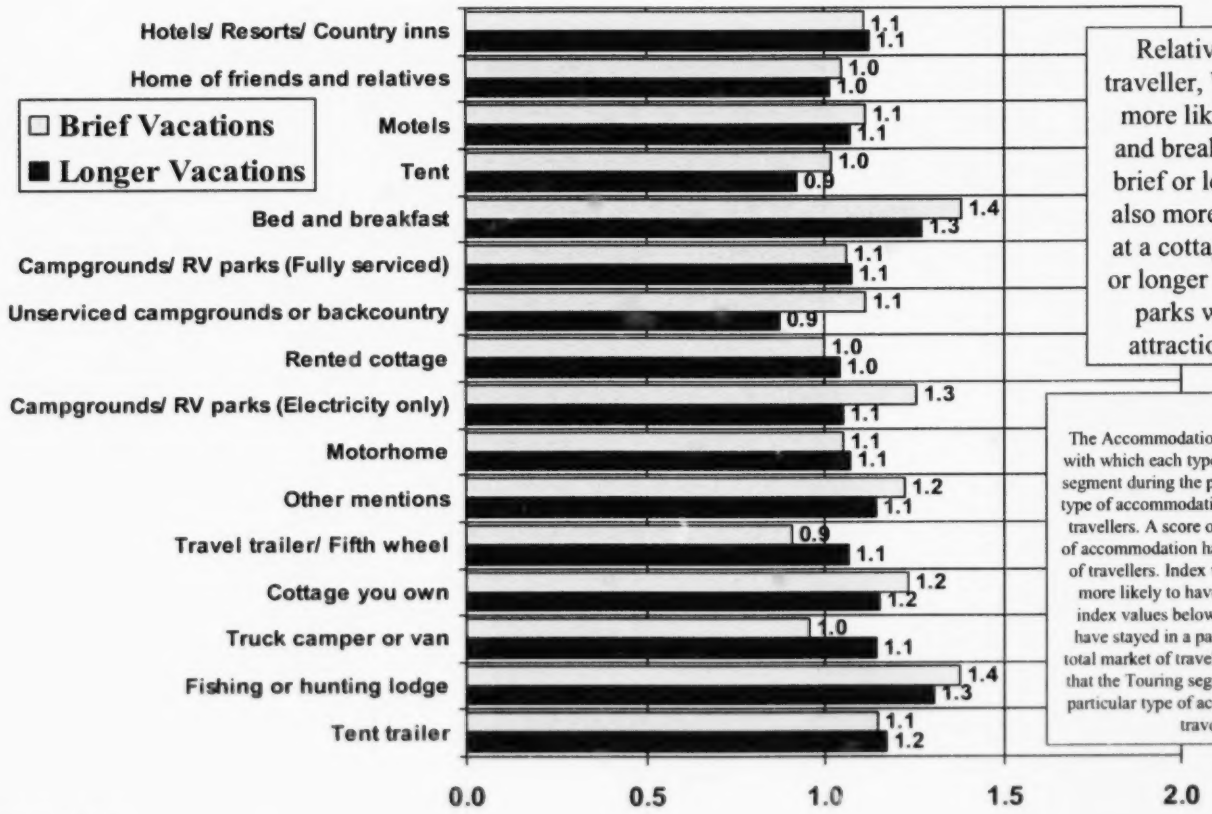


Wine Tour Enthusiasts were more likely to vacation as a couple or with their friends, relative to the average traveller. This pattern is especially evident for brief (1 to 3 day) vacations.

Types of Accommodations Used for Brief and Longer Trips During Past Two Years (Indexed)

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the average vacation traveller, Wine Tour Enthusiasts were more likely to have stayed in a bed and breakfast or in a lodge on either brief or longer vacations. They were also more likely than average to stay at a cottage they own for either brief or longer stays. Campgrounds or RV parks with electricity have some attraction, but only for brief trips.

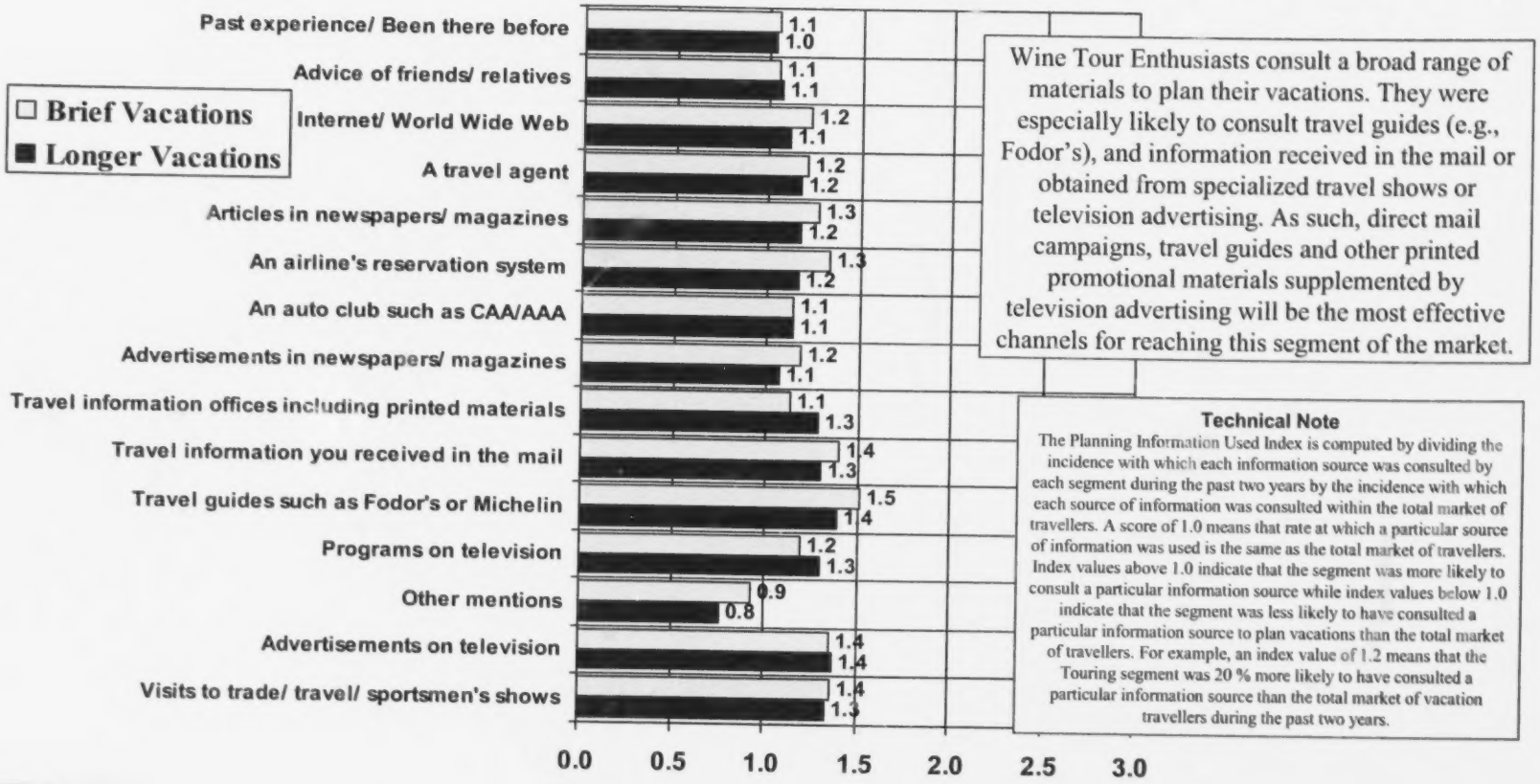
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to have stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of vacation travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past Two Years (Indexed)

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Wine Tour Enthusiasts consult a broad range of materials to plan their vacations. They were especially likely to consult travel guides (e.g., Fodor's), and information received in the mail or obtained from specialized travel shows or television advertising. As such, direct mail campaigns, travel guides and other printed promotional materials supplemented by television advertising will be the most effective channels for reaching this segment of the market.

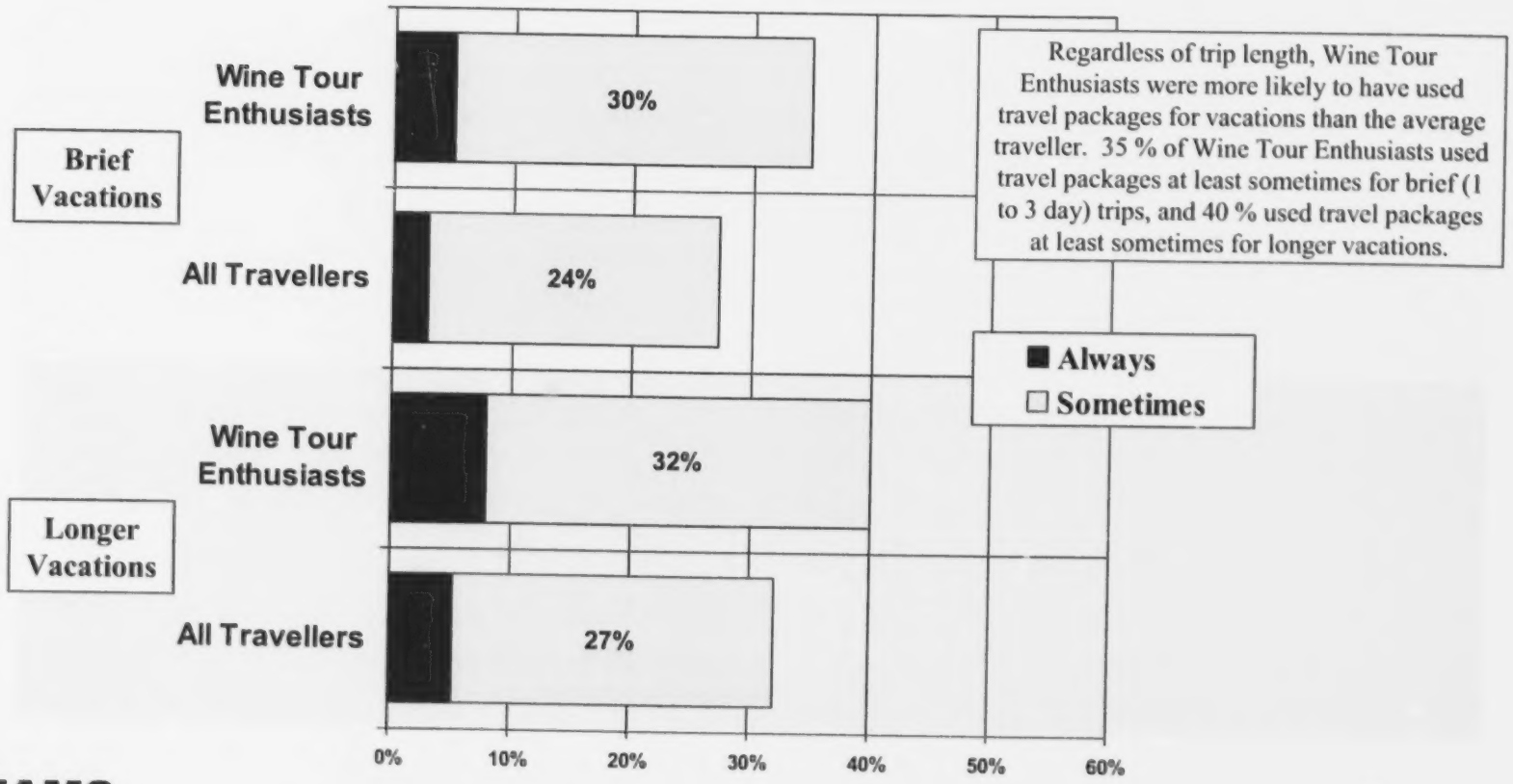
Technical Note

The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of travellers. For example, an index value of 1.2 means that the Touring segment was 20 % more likely to have consulted a particular information source than the total market of vacation travellers during the past two years.

How Often Travel Packages Used for Brief and Longer Vacations During Past Two Years

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



TAMS
Travel Activities & Motivation Survey

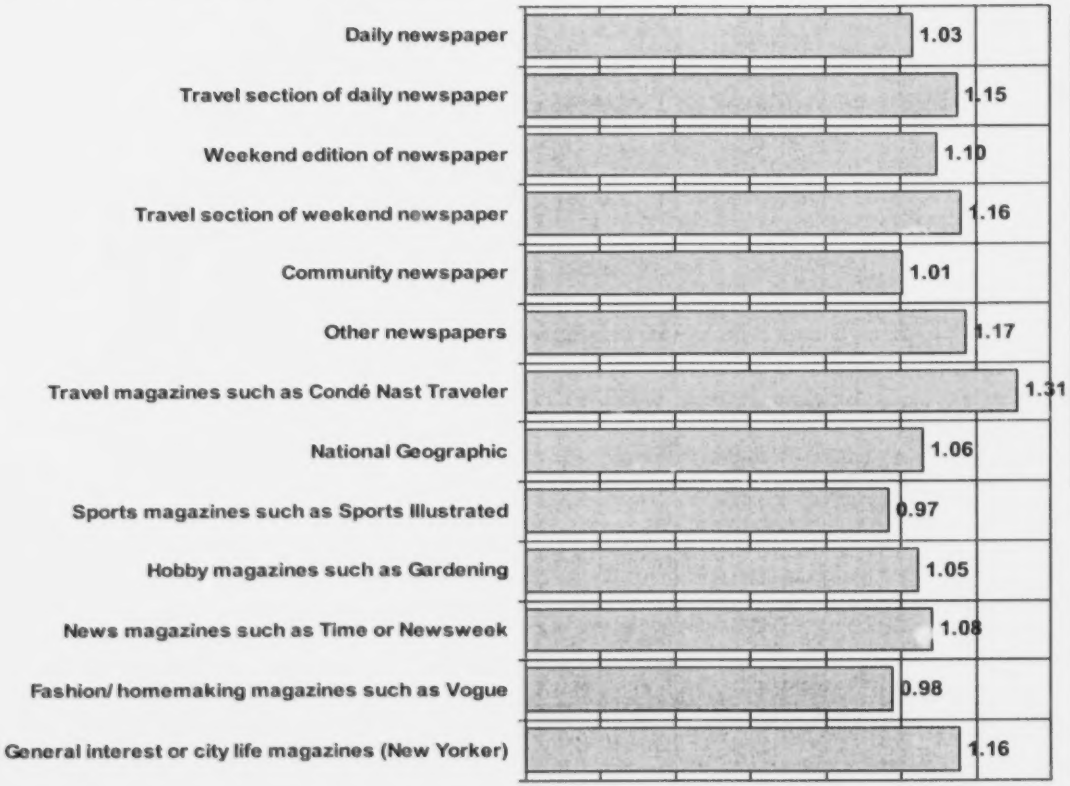
TAMS: Touring Segmentation

Lang RESEARCH

Media Index for Print Media: Canada & United States

Wine Tour Enthusiasts

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Travellers
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that Wine Tour Enthusiasts can best be reached through specialized travel magazines. They also exhibit above average consumption of general interest or city life magazines such as The New Yorker, and the travel sections of daily or weekend newspapers, as well as other types of newspapers. These results suggest that Wine Tour Enthusiasts are more likely than average to actively search out travel-related information.

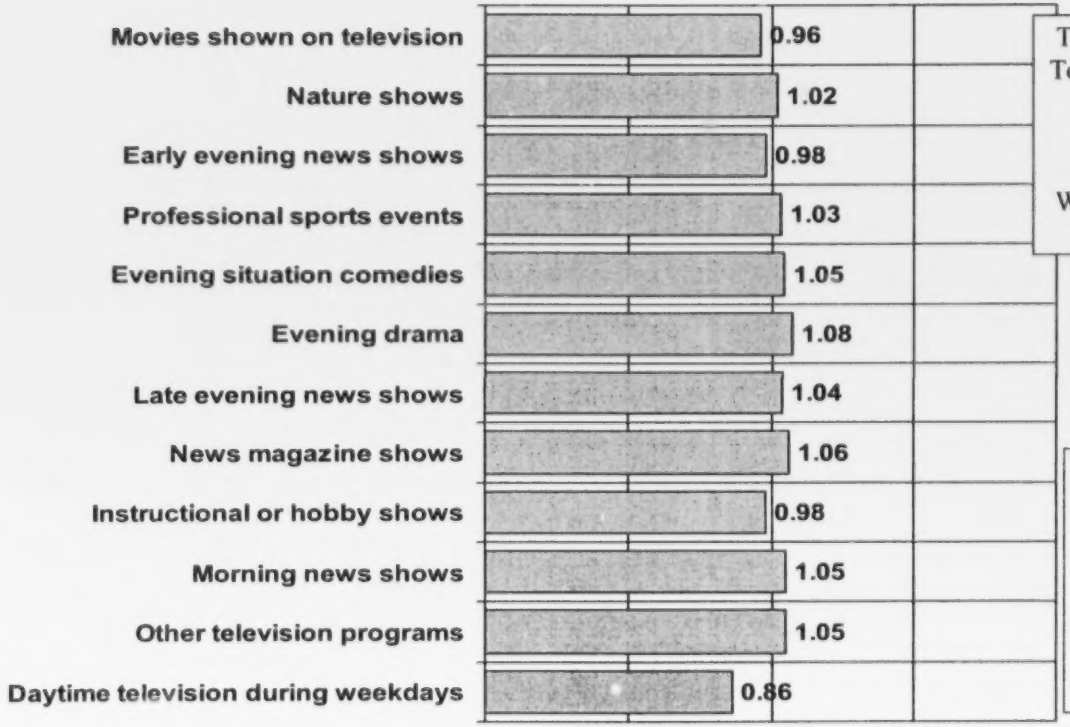
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that Wine Tour Enthusiasts were 20 % more likely to read a particular publication than the total market of vacation travellers.

Media Index for Television Programming: Canada & United States

Wine Tour Enthusiasts

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Travellers
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



The television viewing habits of Wine Tour Enthusiasts roughly correspond to those of the typical traveller. This suggests that there may be greater efficiency in communicating with Wine Tour Enthusiasts through travel-related print materials.

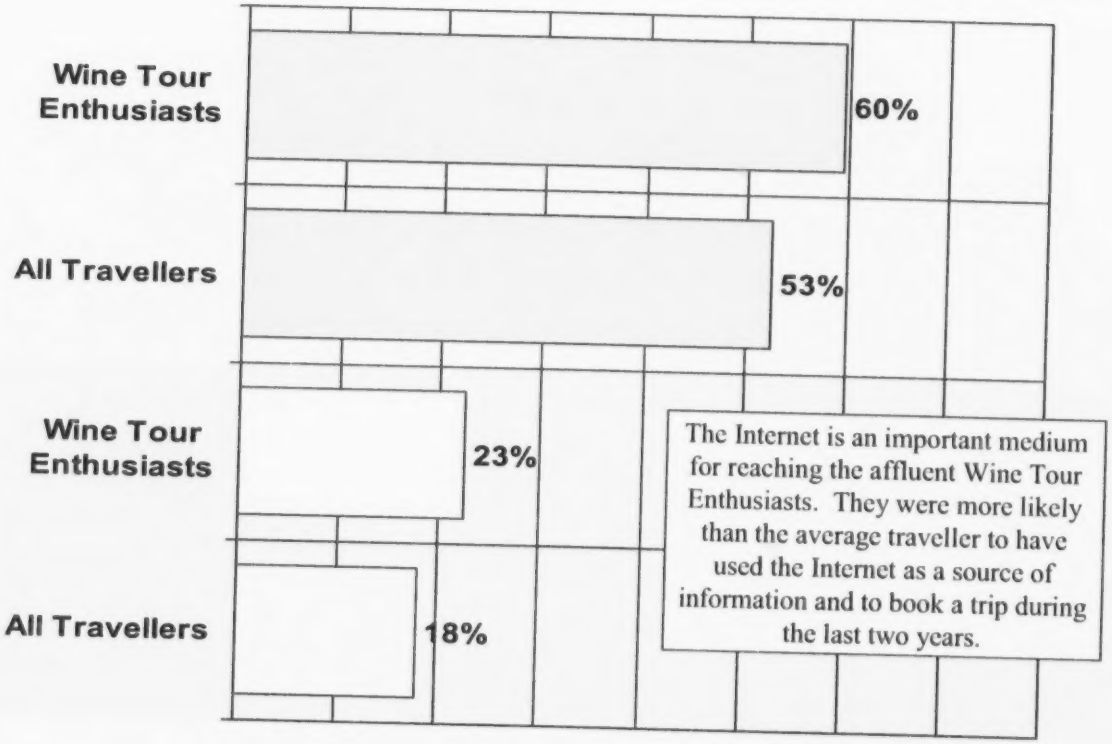
Technical Note

The Media Index is computed by dividing the percent within each segment routinely watching each program by the percent in the total market who routinely watches each program. A score of 1.0 means that viewership is the same as the total market. Index values above 1.0 indicate that the viewership is above average while index values below 1.0 indicate that viewership is below average. For example, an index value of 1.2 means that Wine Tour Enthusiasts were 20 % more likely to watch a particular program than the total market of vacation travellers.

Percent Using Internet and Booking At Least One Trip Using the Internet

Wine Tour Enthusiasts

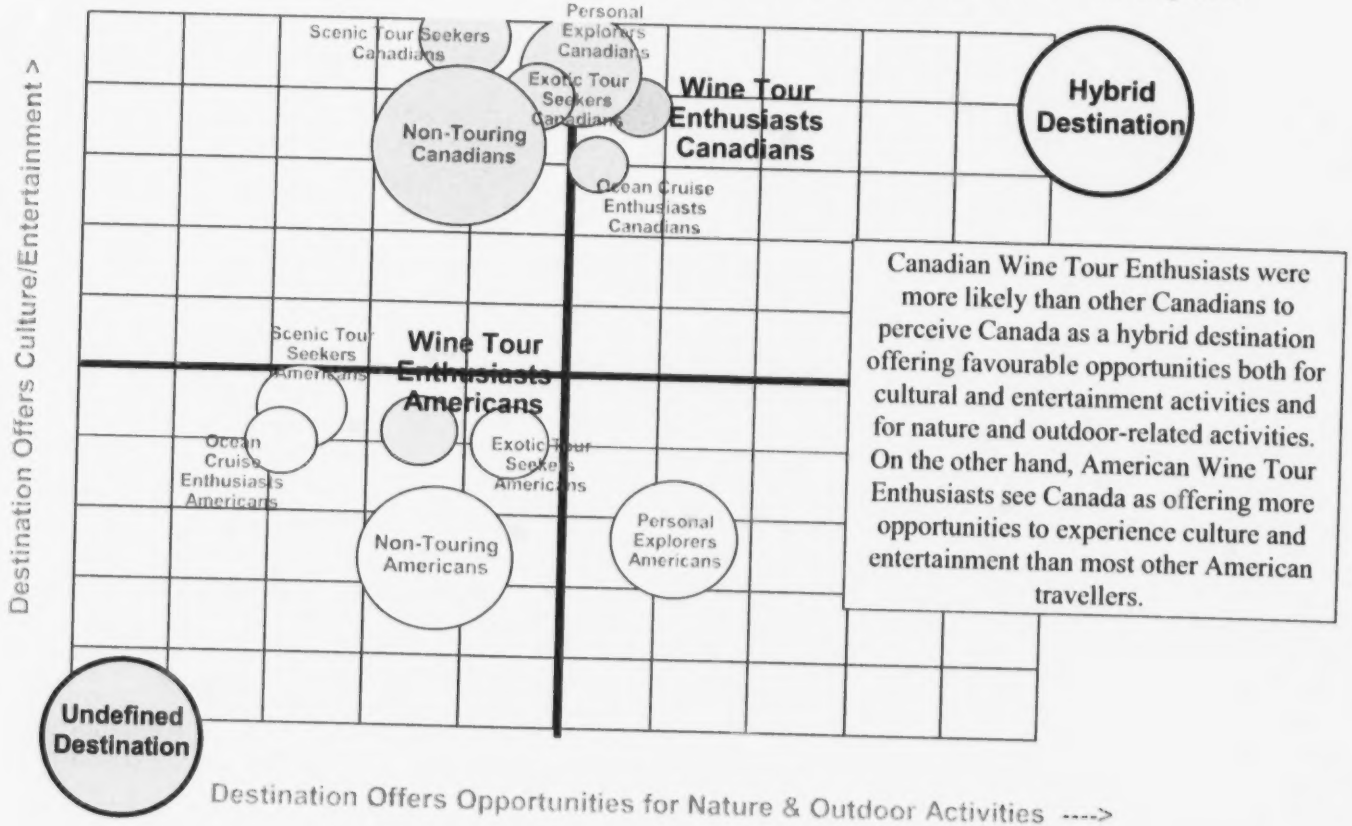
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Vacation Imagery of Canada

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment

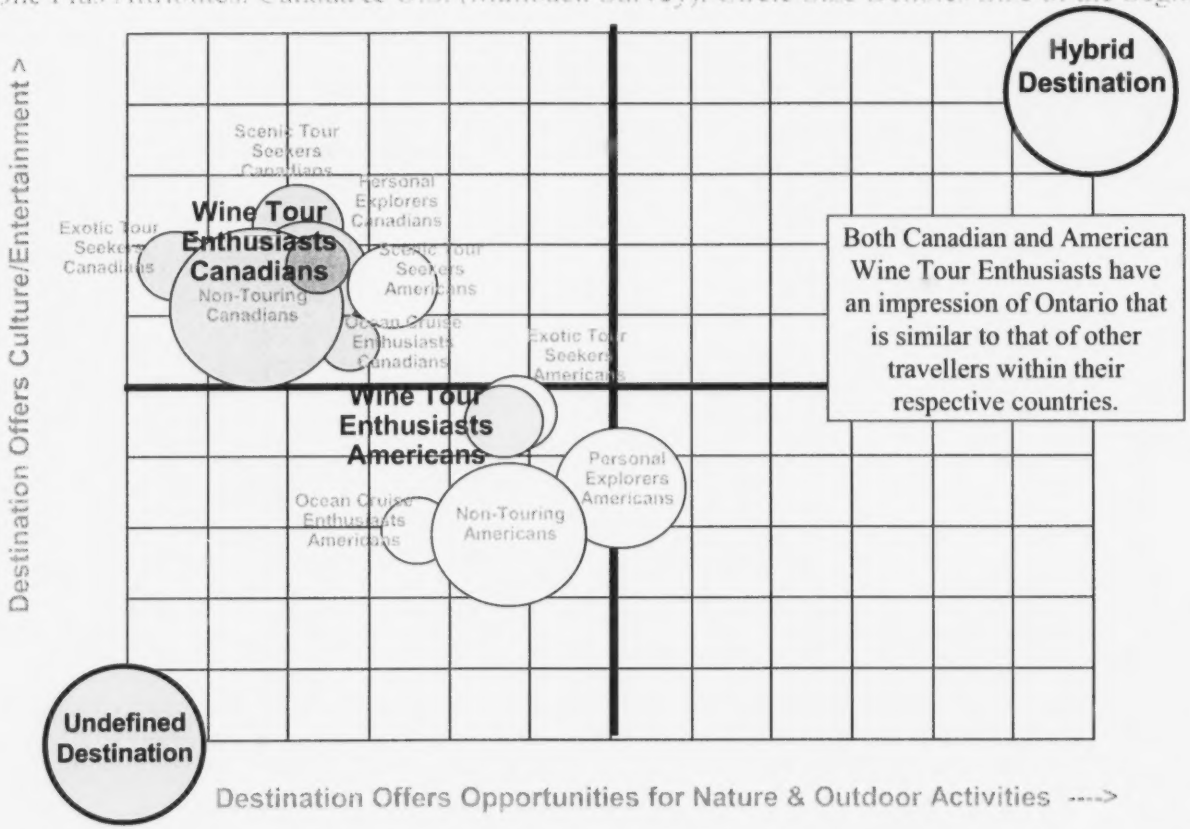


Canadian Wine Tour Enthusiasts were more likely than other Canadians to perceive Canada as a hybrid destination offering favourable opportunities both for cultural and entertainment activities and for nature and outdoor-related activities. On the other hand, American Wine Tour Enthusiasts see Canada as offering more opportunities to experience culture and entertainment than most other American travellers.

Vacation Imagery of Ontario

Wine Tour Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



TAMS
Travel Activities & Motivation Survey

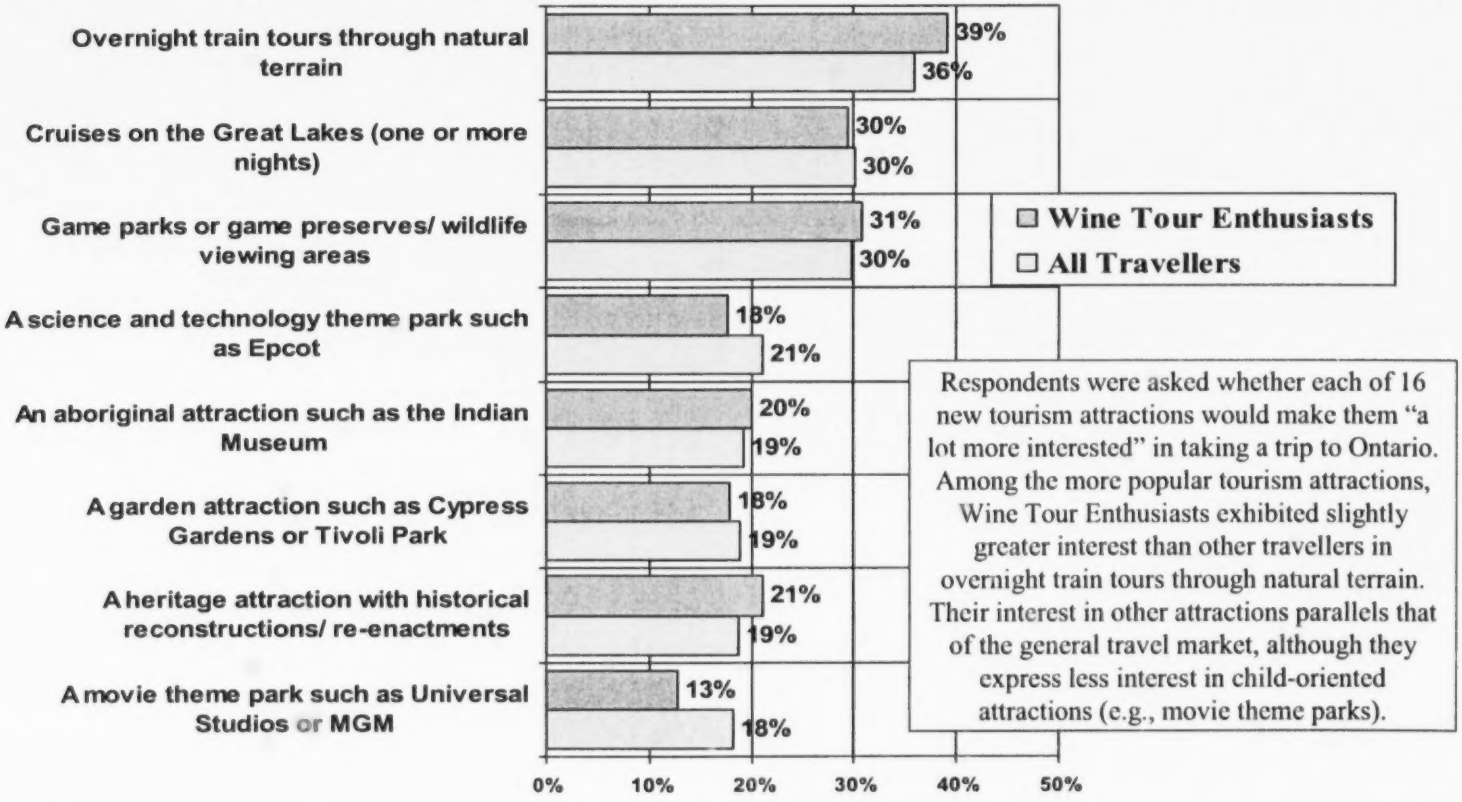
TAMS: Touring Segmentation

Lang RESEARCH

Interest in New Tourism Products

Wine Tour Enthusiasts (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

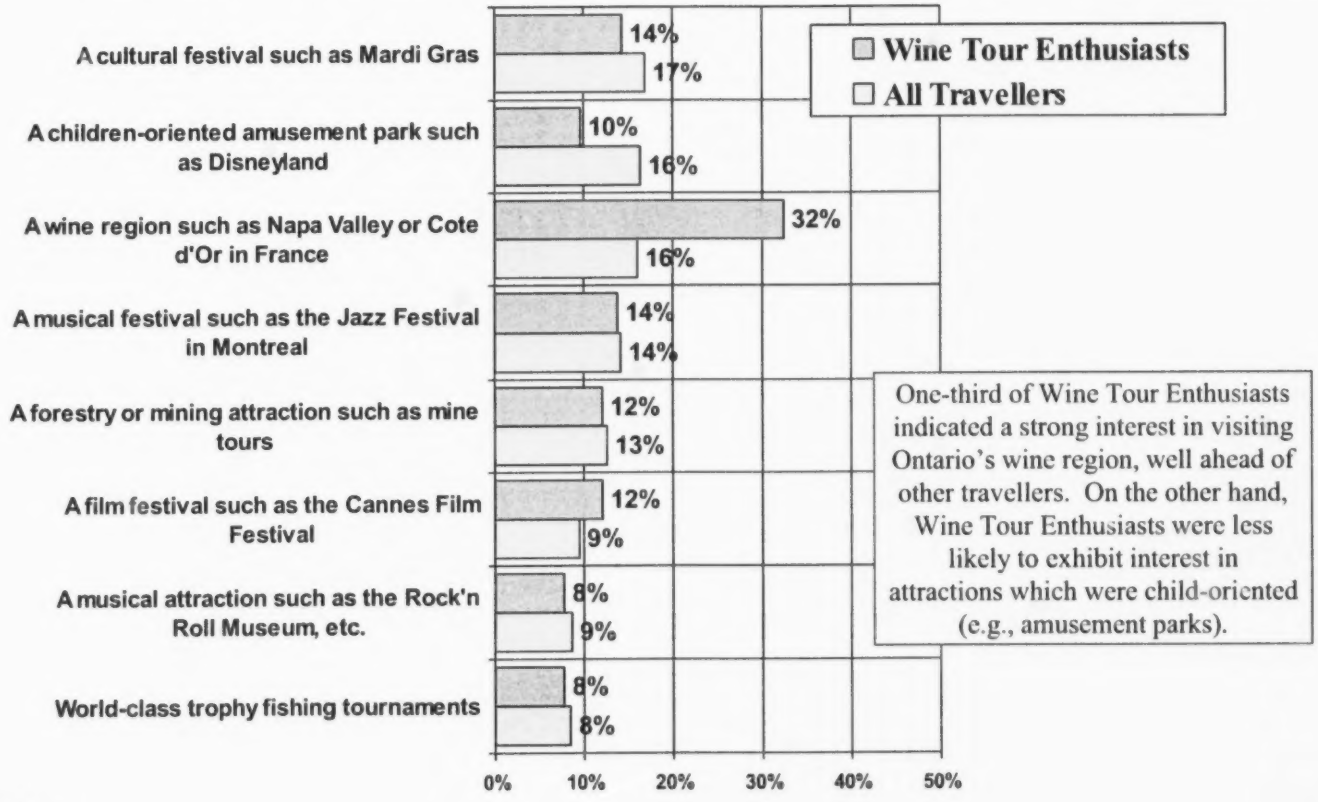


Respondents were asked whether each of 16 new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, Wine Tour Enthusiasts exhibited slightly greater interest than other travellers in overnight train tours through natural terrain. Their interest in other attractions parallels that of the general travel market, although they express less interest in child-oriented attractions (e.g., movie theme parks).

Interest in New Tourism Products

Wine Tour Enthusiasts (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Section Four

Scenic Tour Seekers

Detailed Segment Profile

Scenic Tour Seekers

Scenic Tour Seekers represent 8.9 % of Canadian travellers and 9.5 % of American travellers. Their levels of education and household income were lower than those of other touring travellers, and closer to those of the general population. Mature Mainstream Singles and Senior Singles were especially over-represented among the Scenic Tour Seekers.

Scenic Tour Seekers travelled less often than the average traveller, both domestically and internationally. Ontario was the most popular destination for both Canadian and American Scenic Tour Seekers, but American Tour Seekers were more likely than average to be drawn to the scenic attractions of British Columbia and Alberta. Most Canadian Scenic Tour Seekers (73 %) were planning a Canadian vacation in the next two years, although this incidence fell below the national average (79 %). American Scenic Tour Seekers were just as likely as other American vacationers to be planning a Canadian trip (42 % and 39 %, respectively).

Scenic Tour Seekers are most likely to seek out exploratory vacation experiences (especially visiting museums, art galleries and historical sites). They were less likely to have used their vacations as opportunities to seek out romance and relaxation.

Guided tours of a city or the countryside were the most preferred touring activities, and Scenic Tour Seekers exhibited little interest in other types of touring. They were also less likely to participate in outdoor activities, and showed average participation levels in most culture and entertainment activities. They were also more likely to use a motorhome or travel trailer than other travellers. In combination, these findings suggest that "scenic touring" is the main travel pursuit of this segment.

Scenic Tour Seekers were less active vacation planners than the other touring segments. They did not consult any source of information more often than the average traveller. They were below average users of the Internet, which reflects the age of this segment. However, they are above average viewers of daytime television.

Scenic Tour Seekers

Key Demographic Characteristics

Scenic Tour Seekers represent 8.9 % of Canadian travellers and 9.5 % of American travellers. The Scenic Tour Seekers were likely to be older than the average traveller. They report lower household income and less education than the average traveller, perhaps reflecting the age of this segment and the fact that many are single income households, or households with retired persons.

Percent of Total Population:	7.9 % [Canada]; 8.4 % [United States]
Percent of Travellers:	8.9 % [Canada]; 9.5 % [United States]
Number of Individuals in Segment:	1,546,300 [Canada]; 14,407,400 [United States]
Average Age/Dominant Age Range:	47.8 years old; 36 Plus (68.5 %)
Dominant Life Cycle Stages:	Senior Singles [Index=162; 10.1 %]
	Senior Couples [Index=155; 10.2 %]
	Mature Couples [Index=124; 16.7 %]
Household Income:	$51,000; 11.3 % HHI of $80K or more
Percent with Post-Secondary Education:	45.9 % University/College; 57.1 % Advanced Degrees
Dominant Occupation Status:	52.7 % Employed; 25.5 % Retired; 10.0 % Self-employed

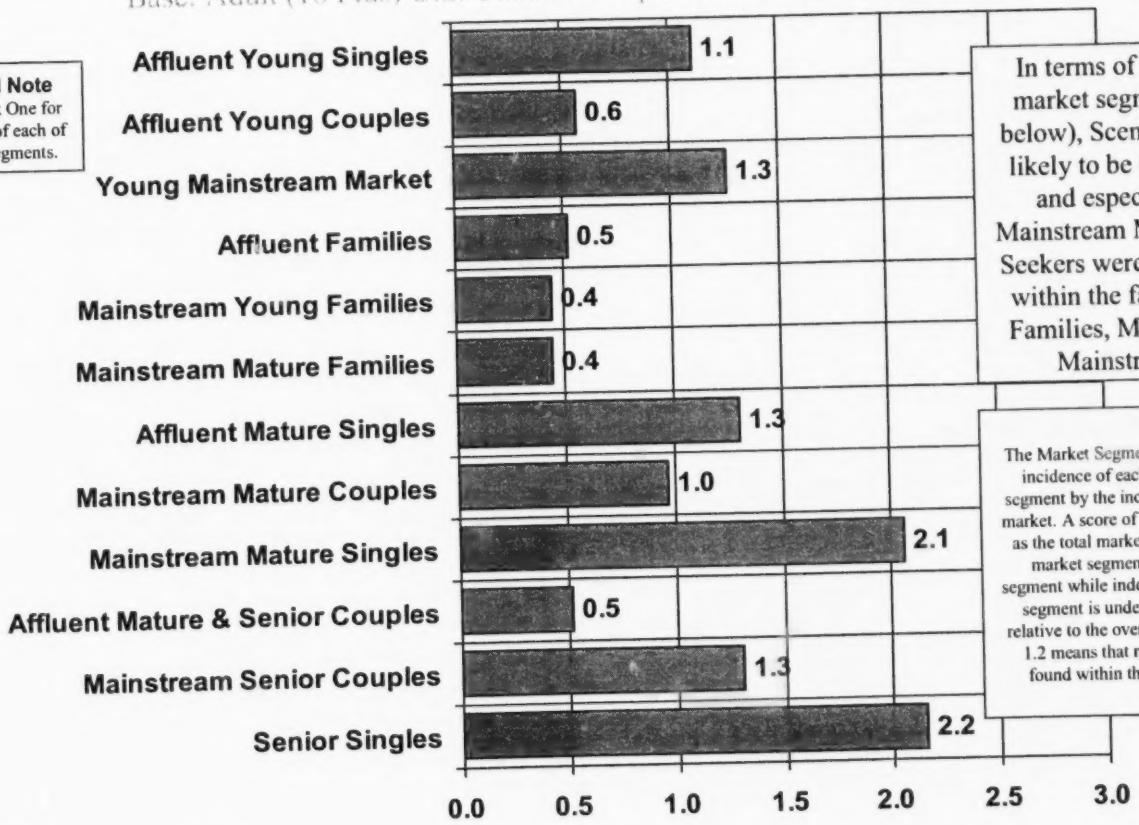
Technical Note
See Appendix One for a description of each of the life cycle stages.

Touring Segmentation: Market Segment Indexing

Scenic Tour Seekers

Distribution of Market Segments within Scenic Tour Seekers Segment Divided By Distribution of Market Segments in Total Population
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



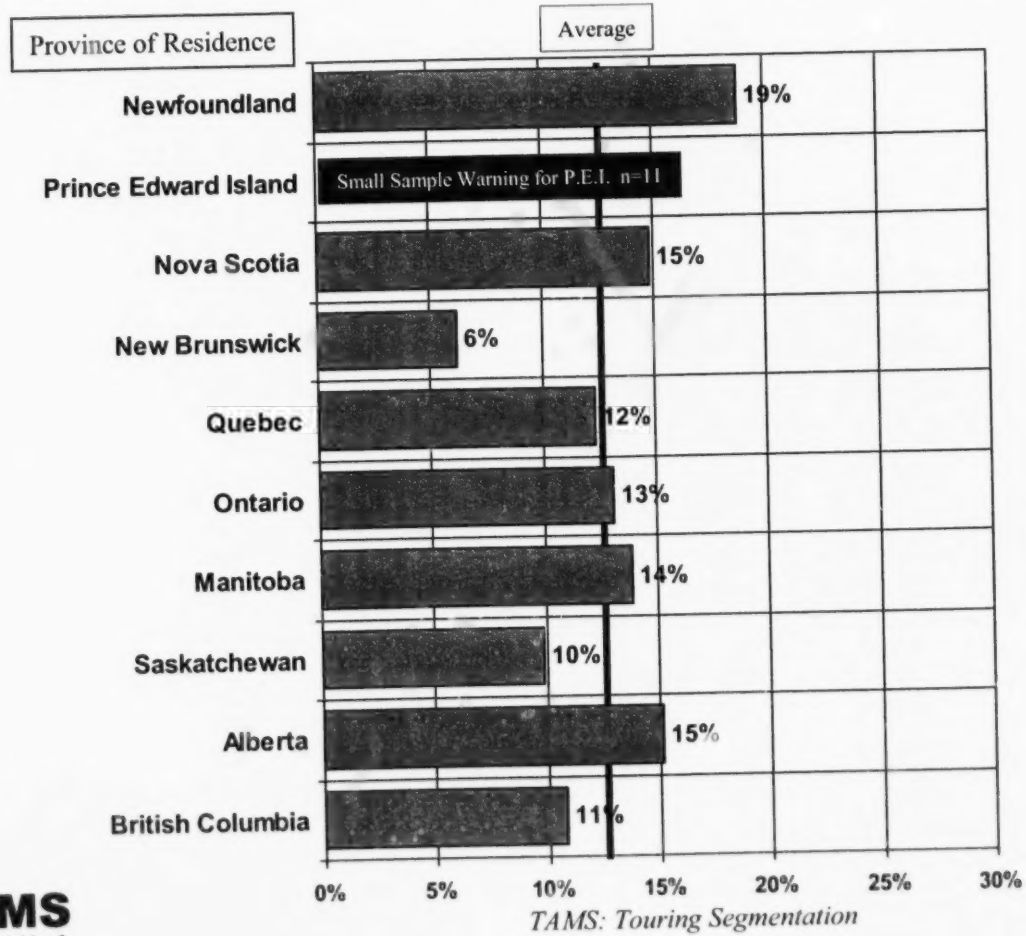
In terms of the demographic lifespan market segments (see Technical Note below), Scenic Tour Seekers were more likely to be found among older singles and especially Senior Singles and Mainstream Mature Singles. Scenic Tour Seekers were the least likely to be found within the families segments (Affluent Families, Mainstream Young Families, Mainstream Mature Families).

Technical Note
The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular touring segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the touring segment while index values below 1.0 indicate that the market segment is under-represented within the touring segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to be found within the particular touring segment than in the general population.

Touring Segment Incidence in Canada

Scenic Tour Seekers: By Province

Base: Adult (18 Plus) Canadian Population Who Took a Trip or Plans to Take a Trip in Past/Next Two Years



Scenic Tour Seekers were slightly more likely to be from Newfoundland, Nova Scotia and Alberta than from other provinces. The national incidence was 13 %.

TAMS: Touring Segmentation

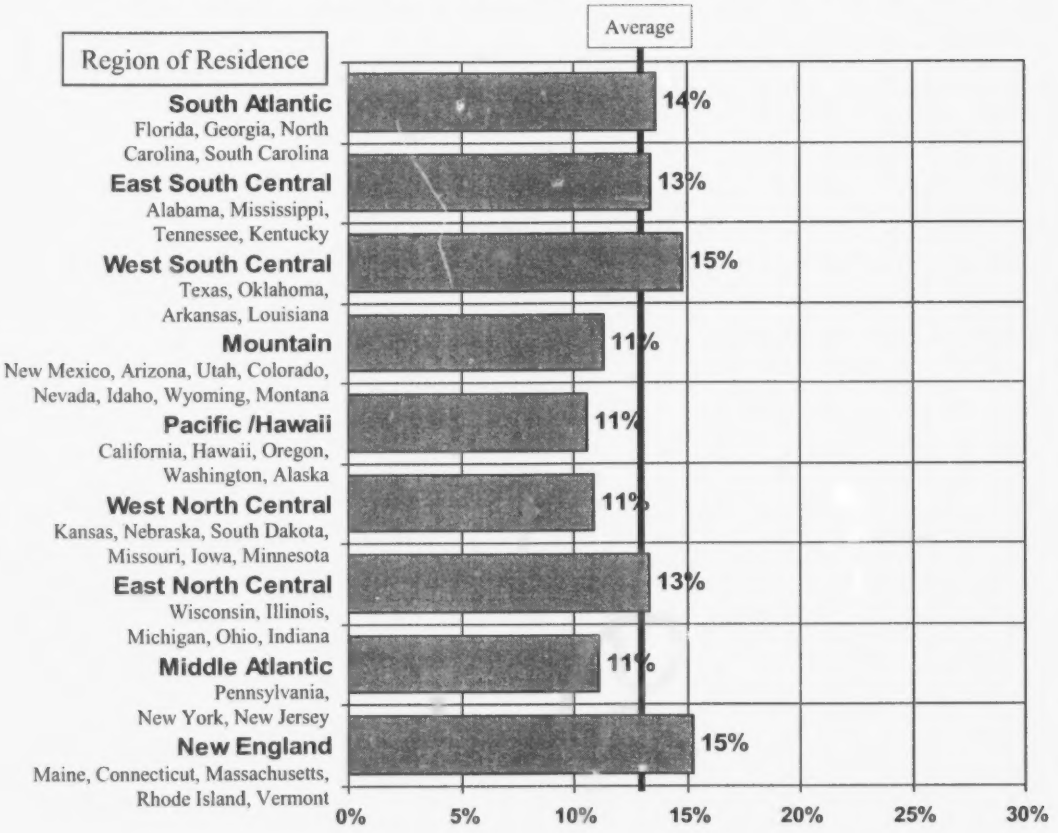
TAMS
Travel Activities & Motivation Survey

Lang RESEARCH

Touring Segment Incidence in United States

Scenic Tour Seekers: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took a Trip or Plans to Take a Trip in Past/Next Two Years

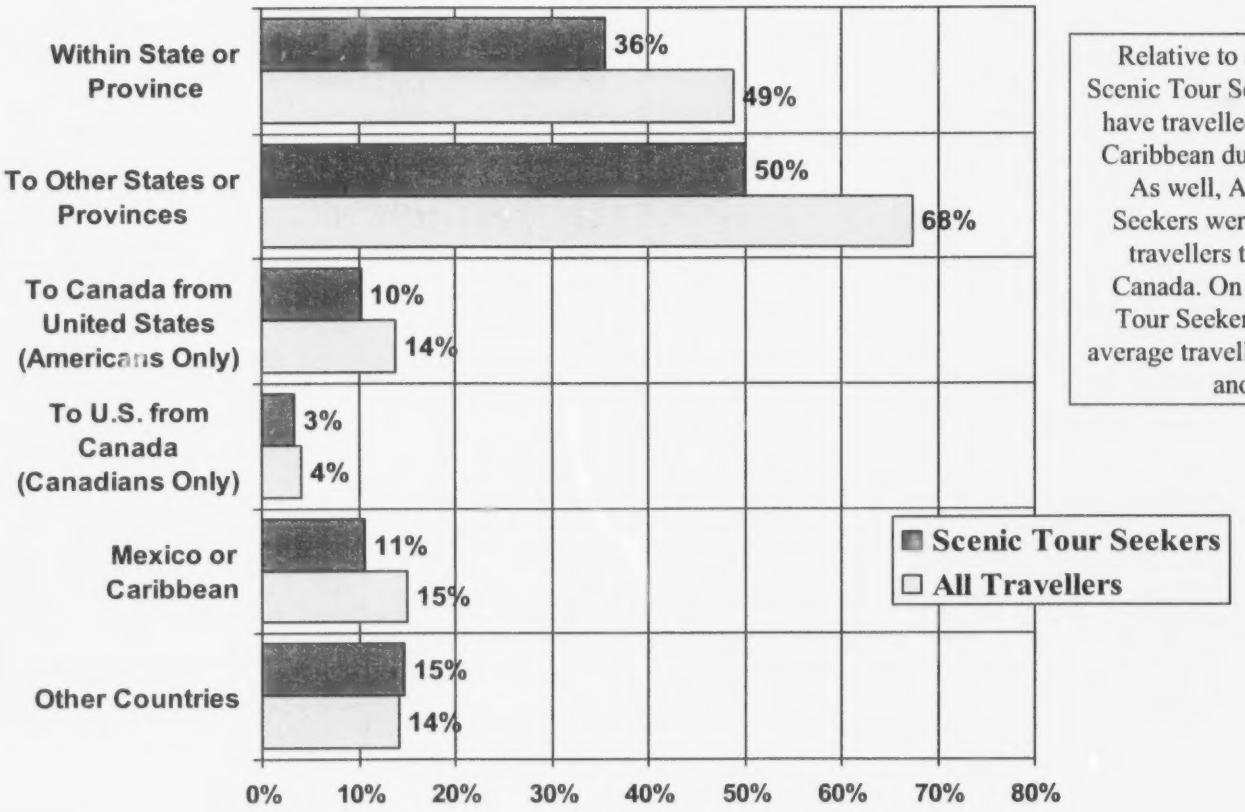


There was relatively little variation in the incidence of Scenic Tour Seekers across the various regions of the United States.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Scenic Tour Seekers

Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years

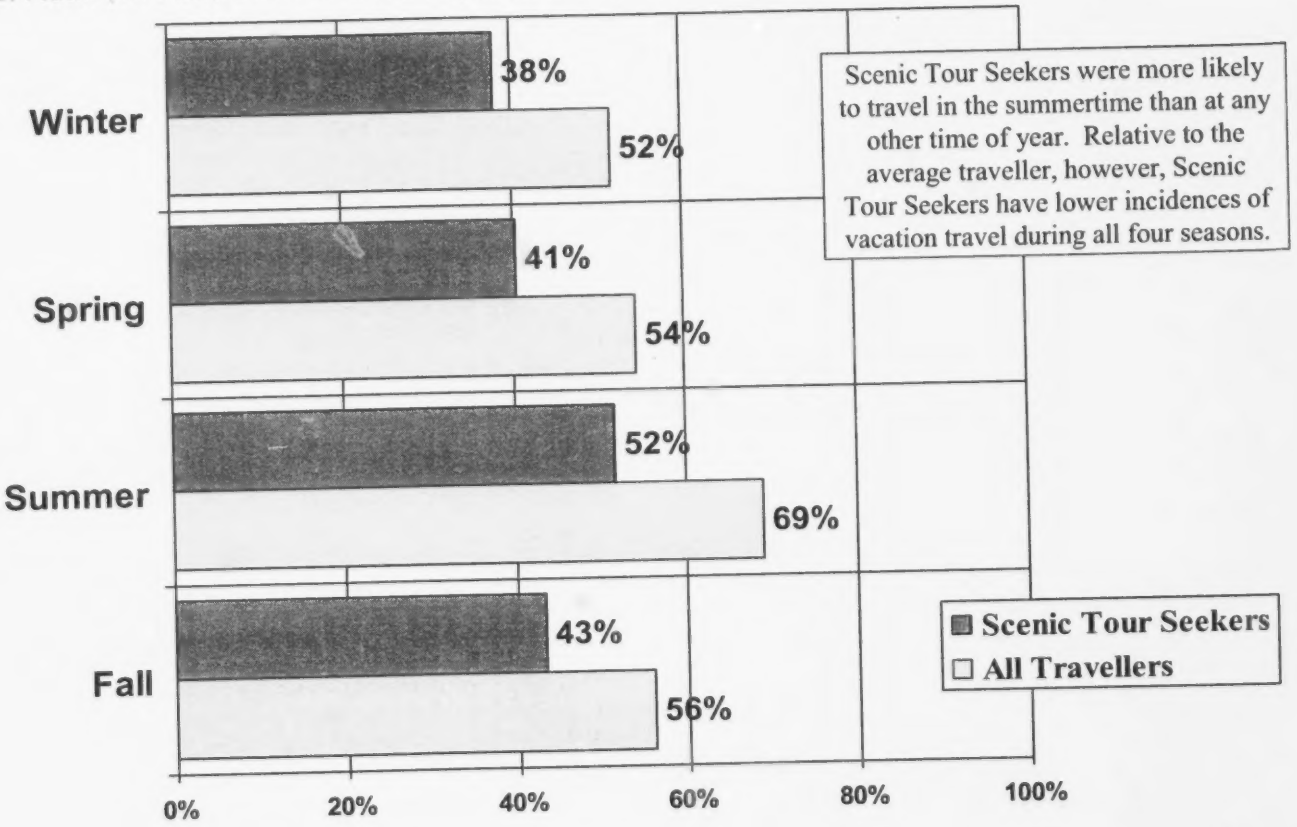


Relative to all vacation travellers, Scenic Tour Seekers were less likely to have travelled domestically or to the Caribbean during the past two years. As well, American Scenic Tour Seekers were less likely than other travellers to have taken a trip to Canada. On the other hand, Scenic Tour Seekers were as likely as the average traveller to have taken a trip to another country.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past Two Years

Scenic Tour Seekers: Percent Taking Trip Each Season

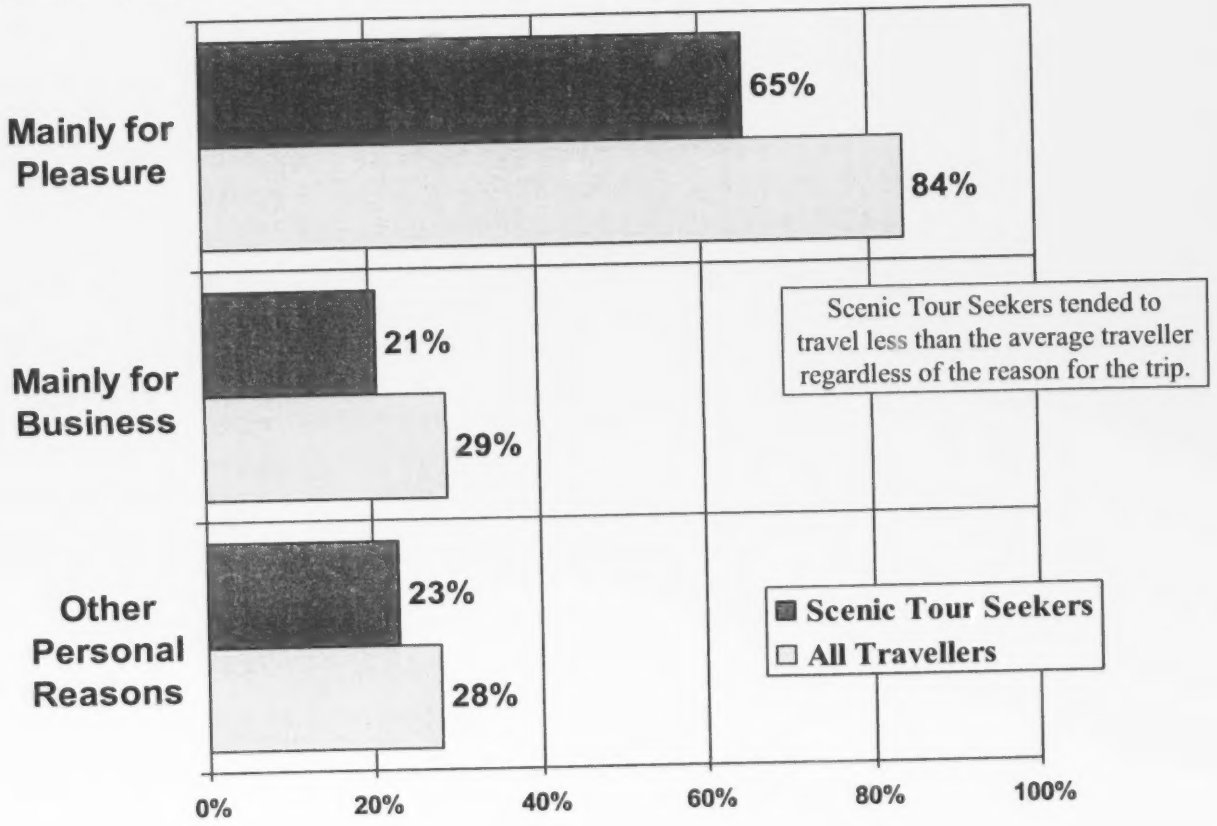
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years



Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past Two Years

Scenic Tour Seekers: Percent Taking Trip for Various Reasons

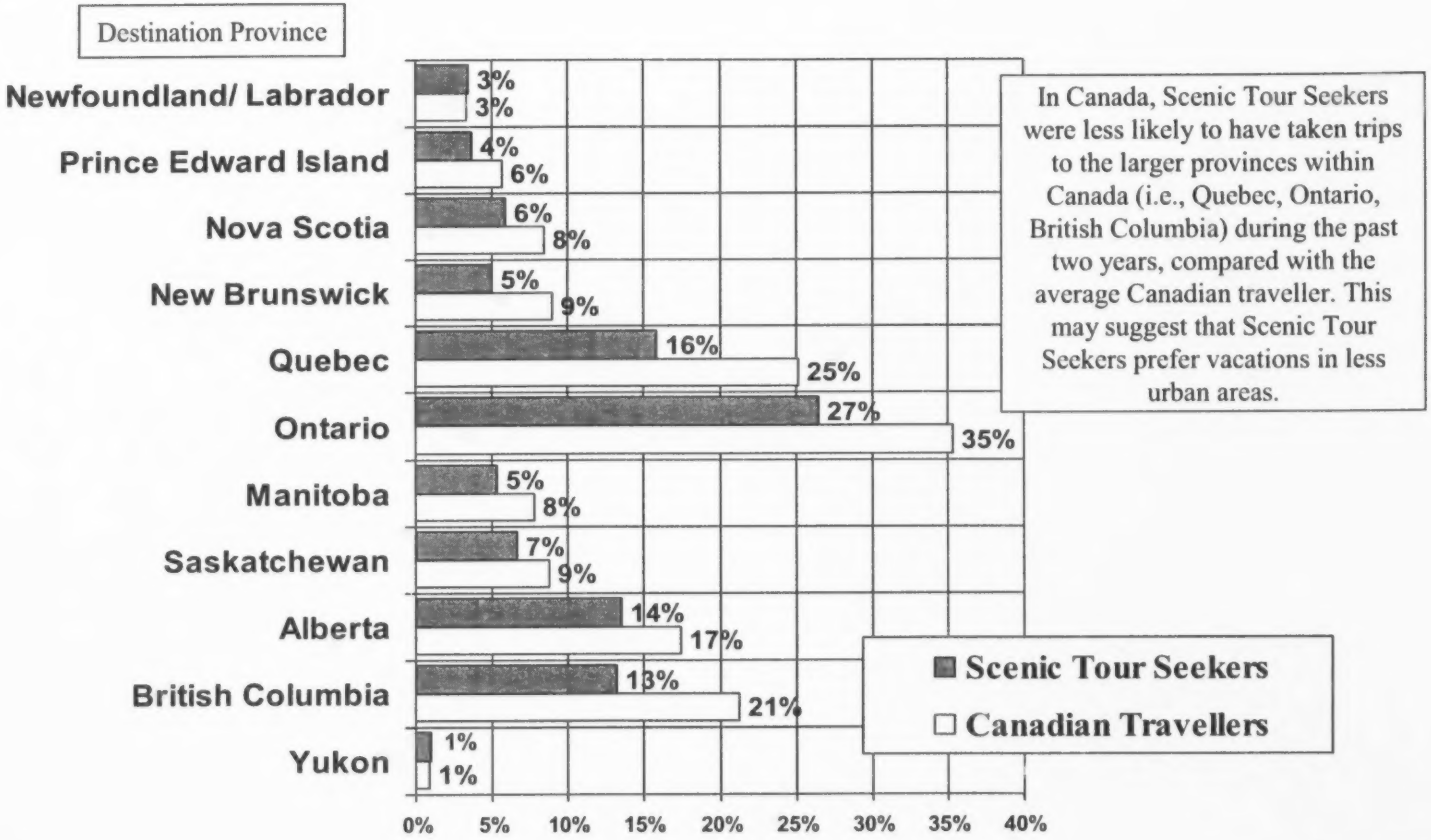
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past Two Years

Scenic Tour Seekers: Percent of Canadians Taking a Trip to Various Provinces

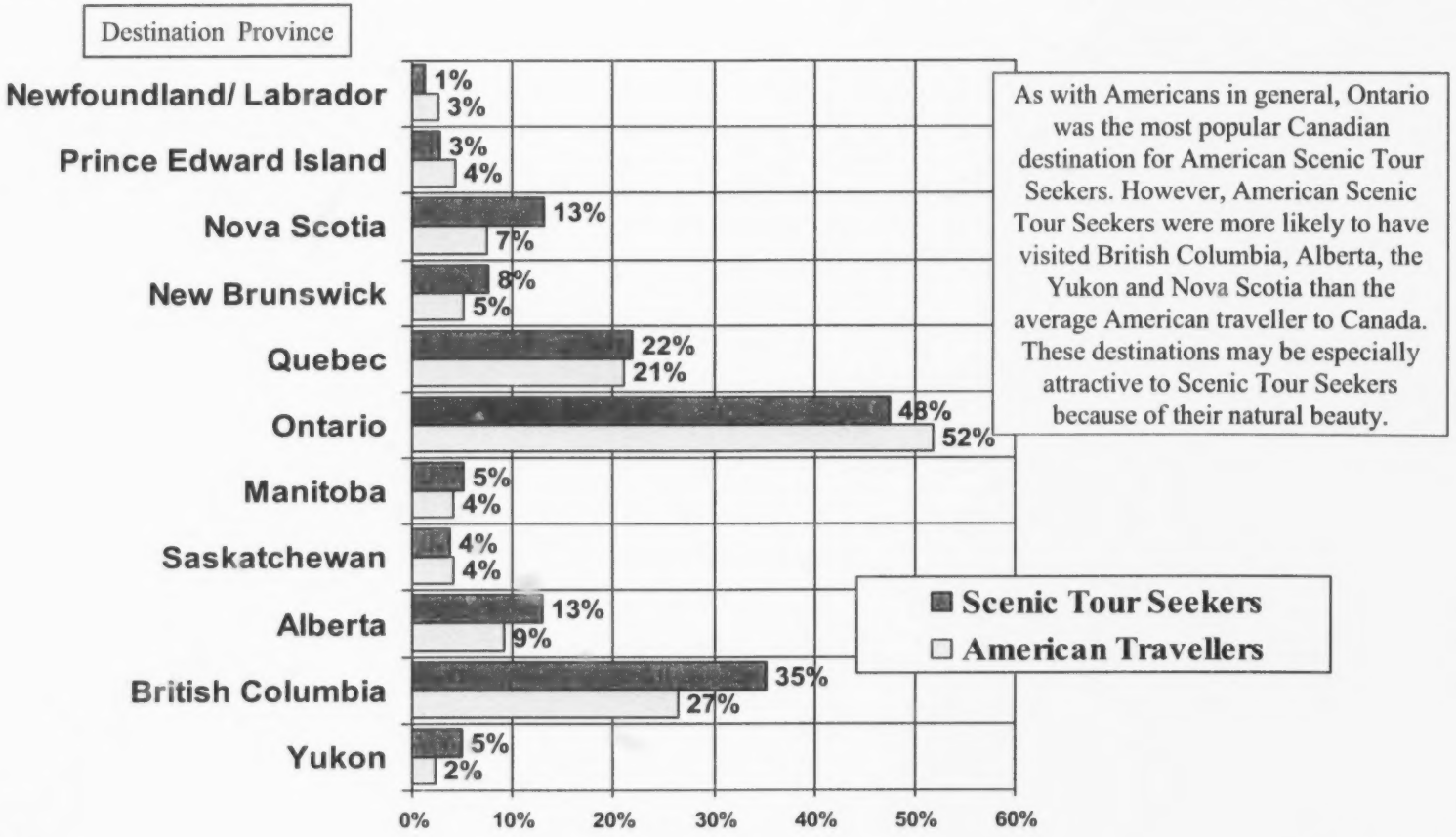
Base: Adult (18 Plus) Canadian Population Who Took a Vacation Trip and Trip Within Canada in the Past Two Years



Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past Two Years

Scenic Tour Seekers: Percent of Americans Taking a Trip to Various Provinces

Base: Adult (18 Plus) U.S. Population Who Took a Vacation Trip and a Trip to Canada in the Past Two Years

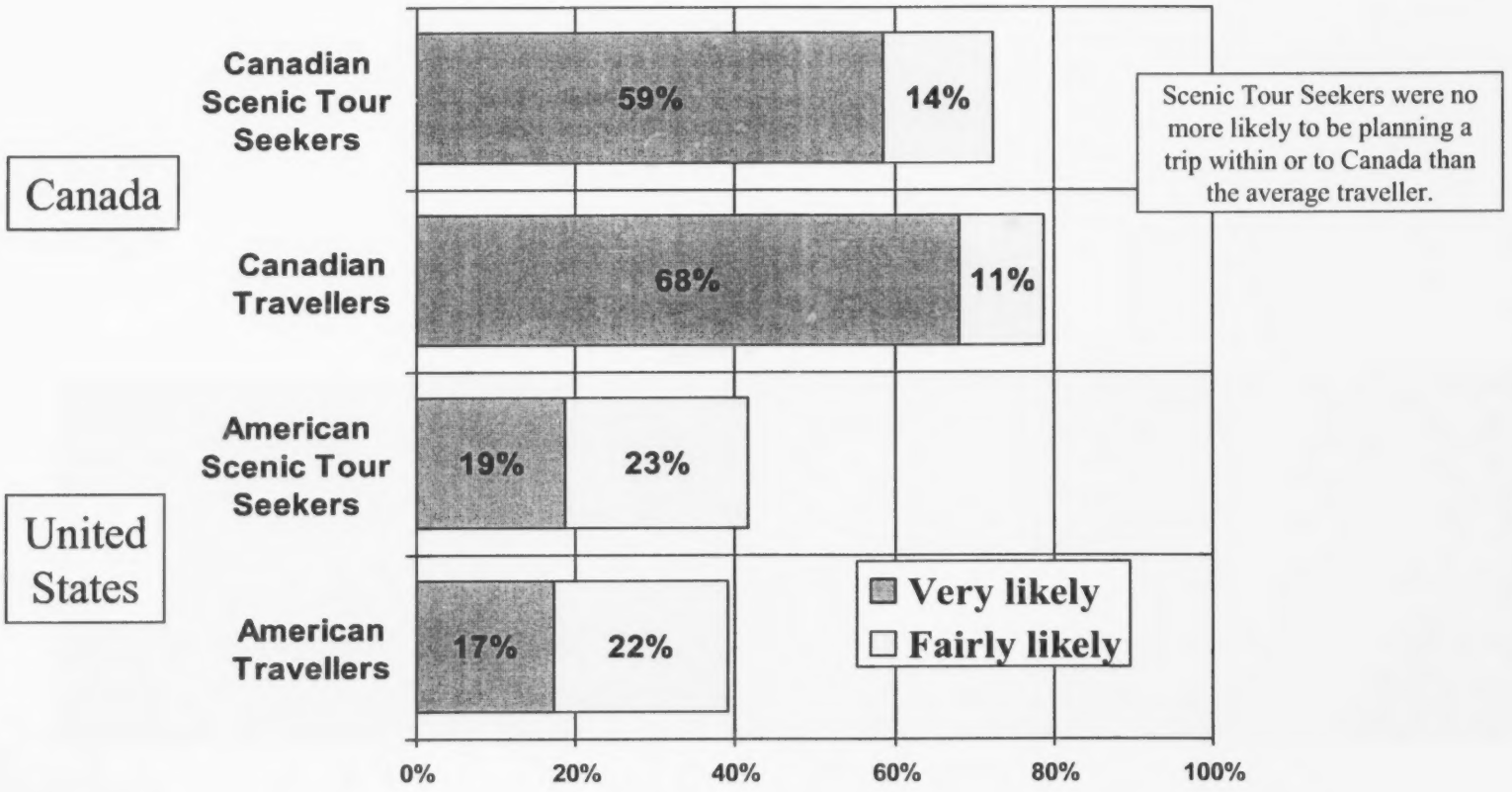


As with Americans in general, Ontario was the most popular Canadian destination for American Scenic Tour Seekers. However, American Scenic Tour Seekers were more likely to have visited British Columbia, Alberta, the Yukon and Nova Scotia than the average American traveller to Canada. These destinations may be especially attractive to Scenic Tour Seekers because of their natural beauty.

Touring Segmentation

Scenic Tour Seekers: Intentions to Travel Within/To Canada Next Two Years

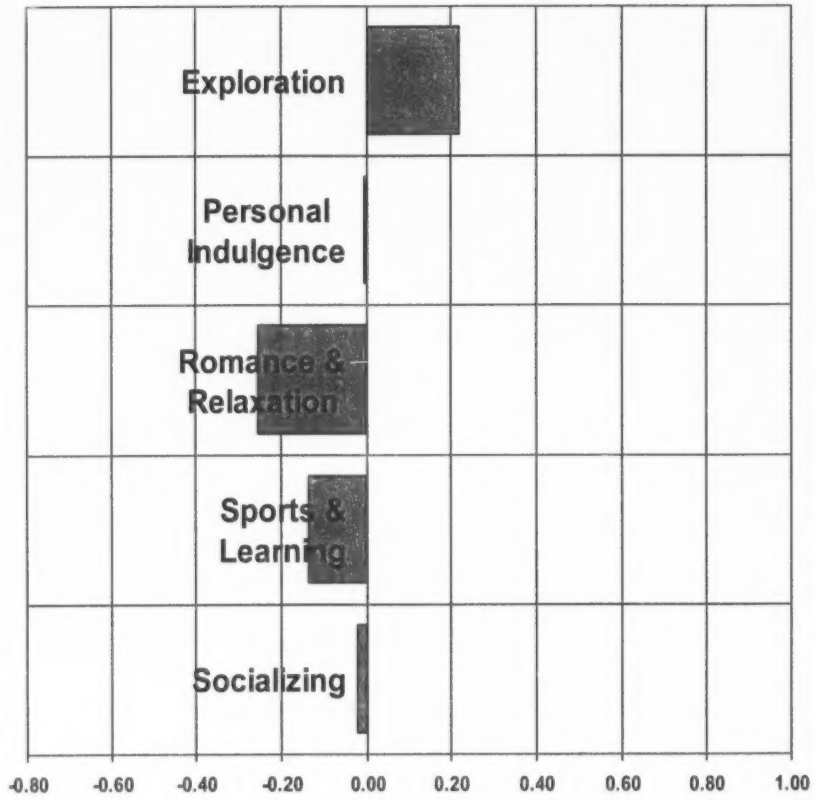
Base: Adult Population (18 Plus) Who Took a Vacation Trip in Last Two Years



General Vacation Experiences Sought During Pleasure Travel in the Past Two Years

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Scenic Tour Seekers were more likely to have sought out exploratory vacation experiences in their vacation trips over the past two years than the average traveller. On the other hand, they were less likely to have sought romance and relaxation vacation experiences, or to have gone on vacation to participate in a sport, or have a hands-on learning experience. This pattern largely reflects the fact that Scenic Tour Seekers are more mature travellers.

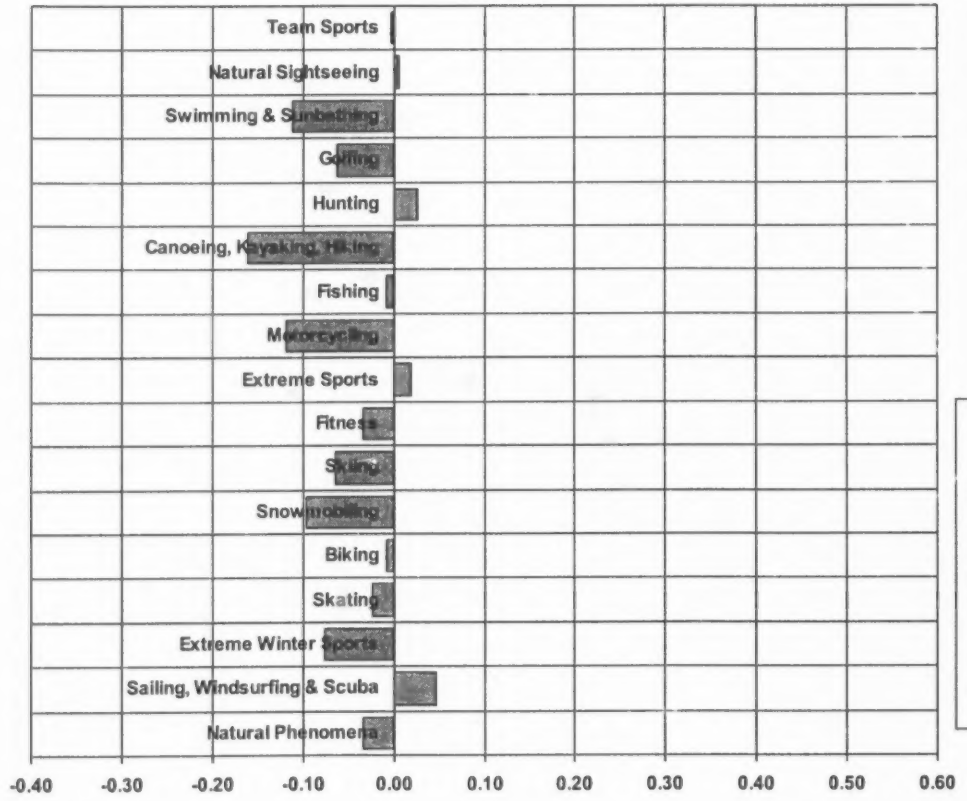
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past Two Years

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



The mature Scenic Tour Seekers sought little in the way of outdoor activities while on vacation during the past two years. Scenic Tour Seekers seem to approach touring as an outdoor travel activity in itself.

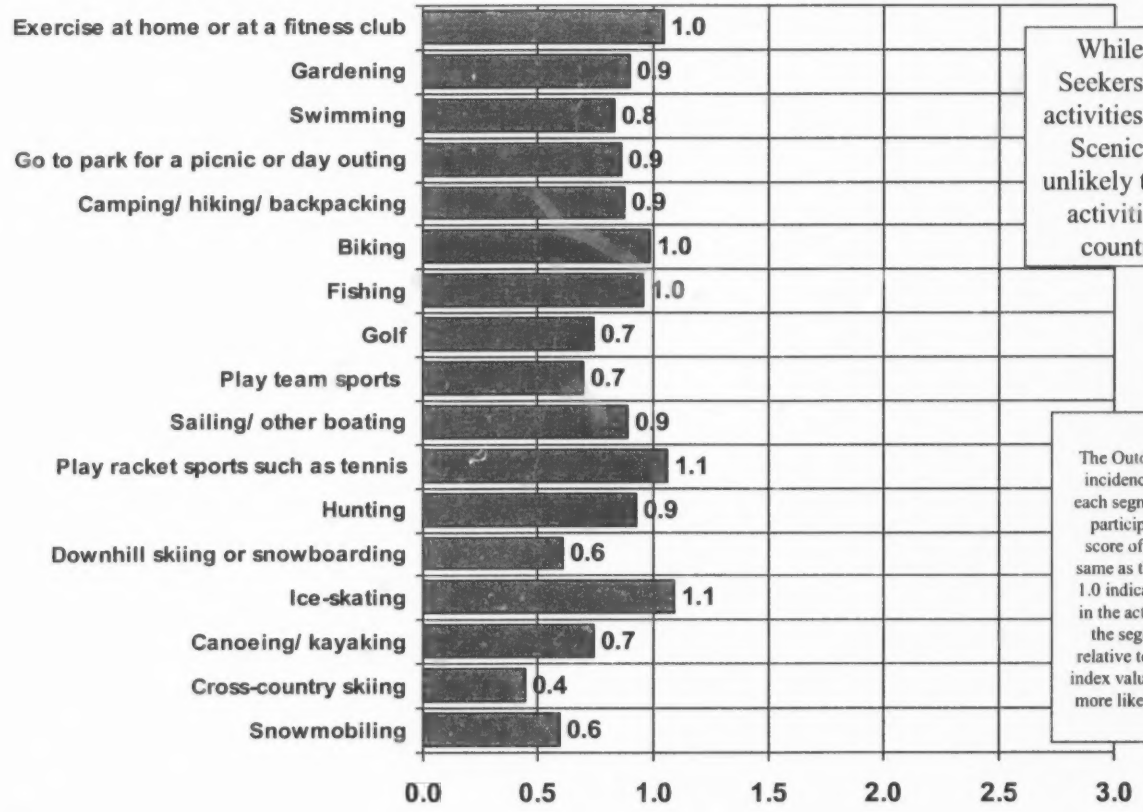
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Scenic Tour Seekers are less active in most outdoor activities, compared with other travellers. Scenic Tour Seekers were especially unlikely to participate in strenuous winter activities such as downhill and cross-country skiing, and snowmobiling.

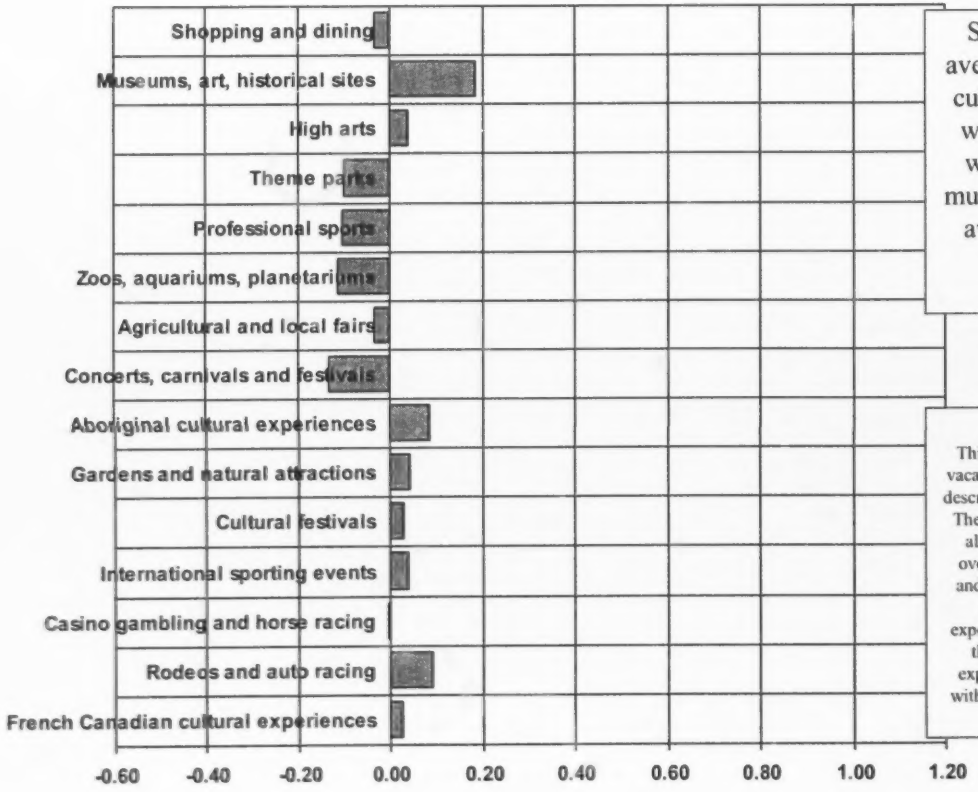
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to participate in a given activity than the total market of vacation travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past Two Years

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Scenic Tour Seekers exhibited an average level of participation in most cultural and entertainment activities while on vacations. However they were more likely to have visited a museum, art or historical site than the average traveller. This reflects the interest of this segment in opportunities to sightsee.

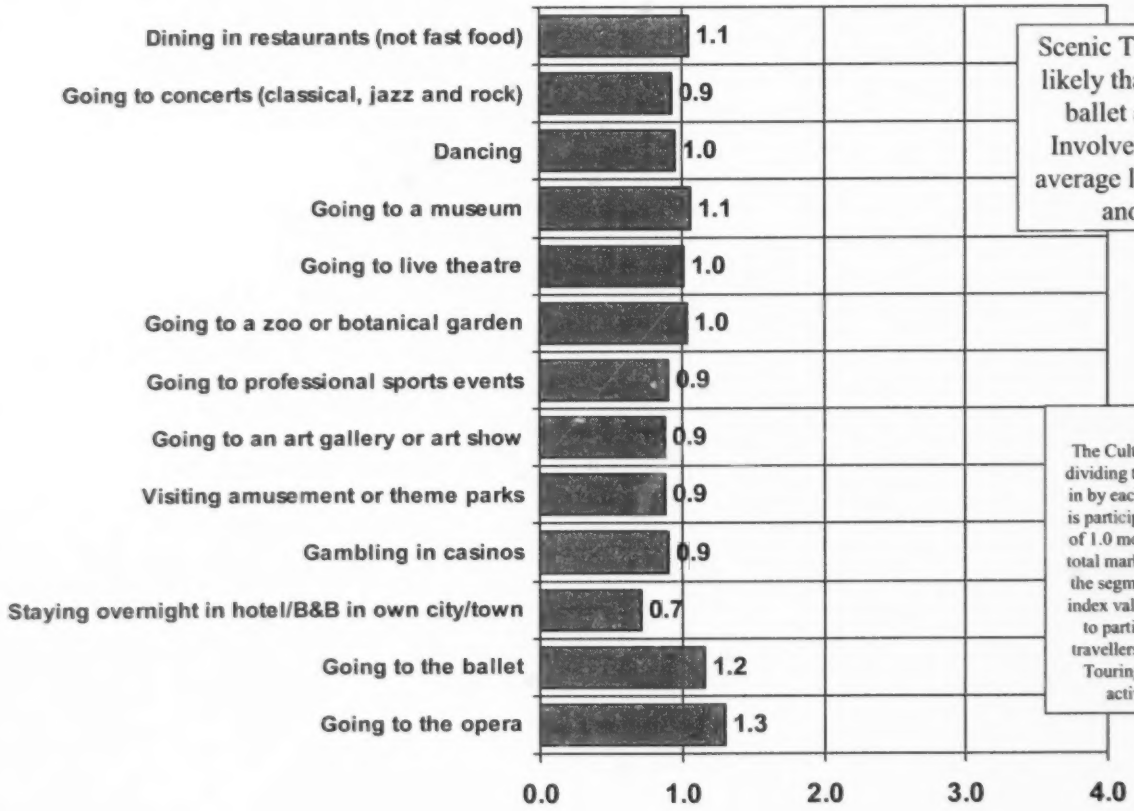
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Scenic Tour Seekers were slightly more likely than other travellers to attend the ballet and the opera when at home. Involvement or attendance remains at average levels for other types of cultural and entertainment activities.

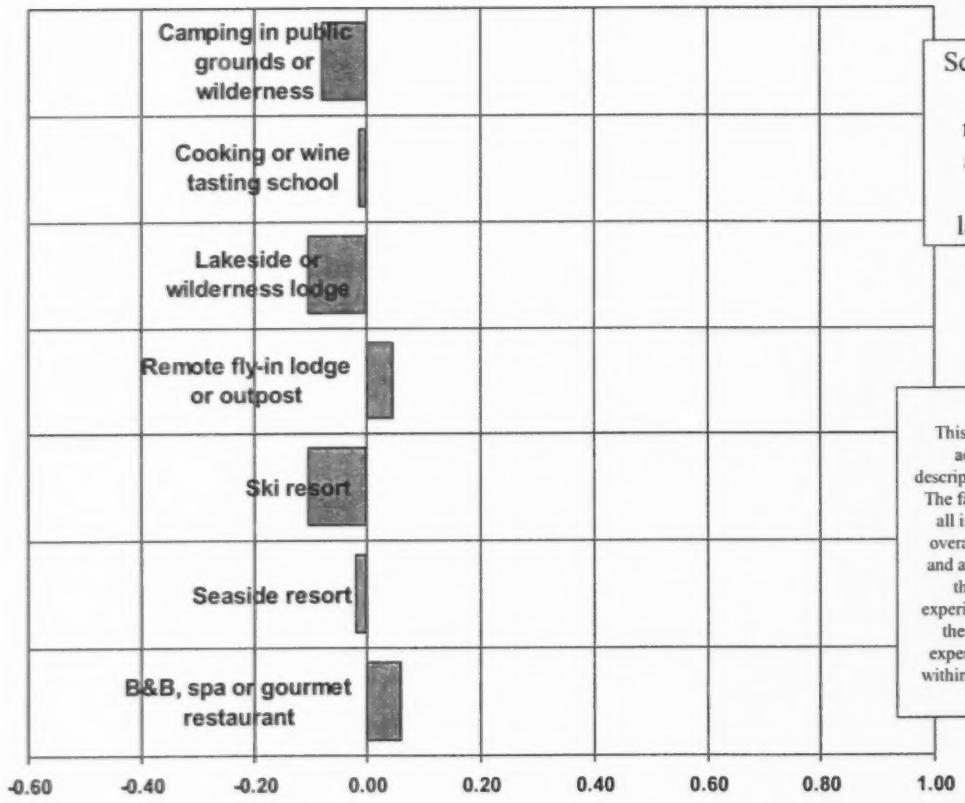
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to participate in the activity than the total market of vacation travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past Two Years

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Scenic Tour Seekers were slightly more likely to have stayed in a B&B, spa or gourmet restaurant (with accommodations) than the average traveller. However, they were less likely to have gone camping, stayed at a lakeside or wilderness lodge, or a ski resort.

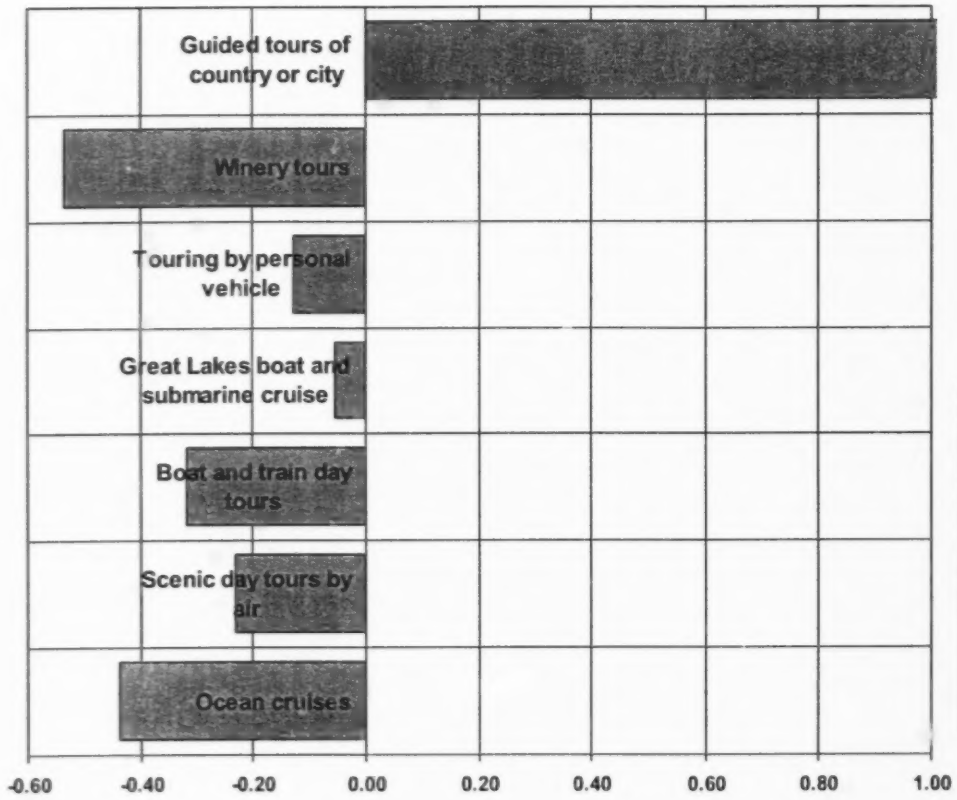
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past Two Years

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Scenic Tour Seekers were much more likely than other travellers to have taken a guided tour of the countryside or city during the last two years. However, they exhibit below average interest in all other types of tours.

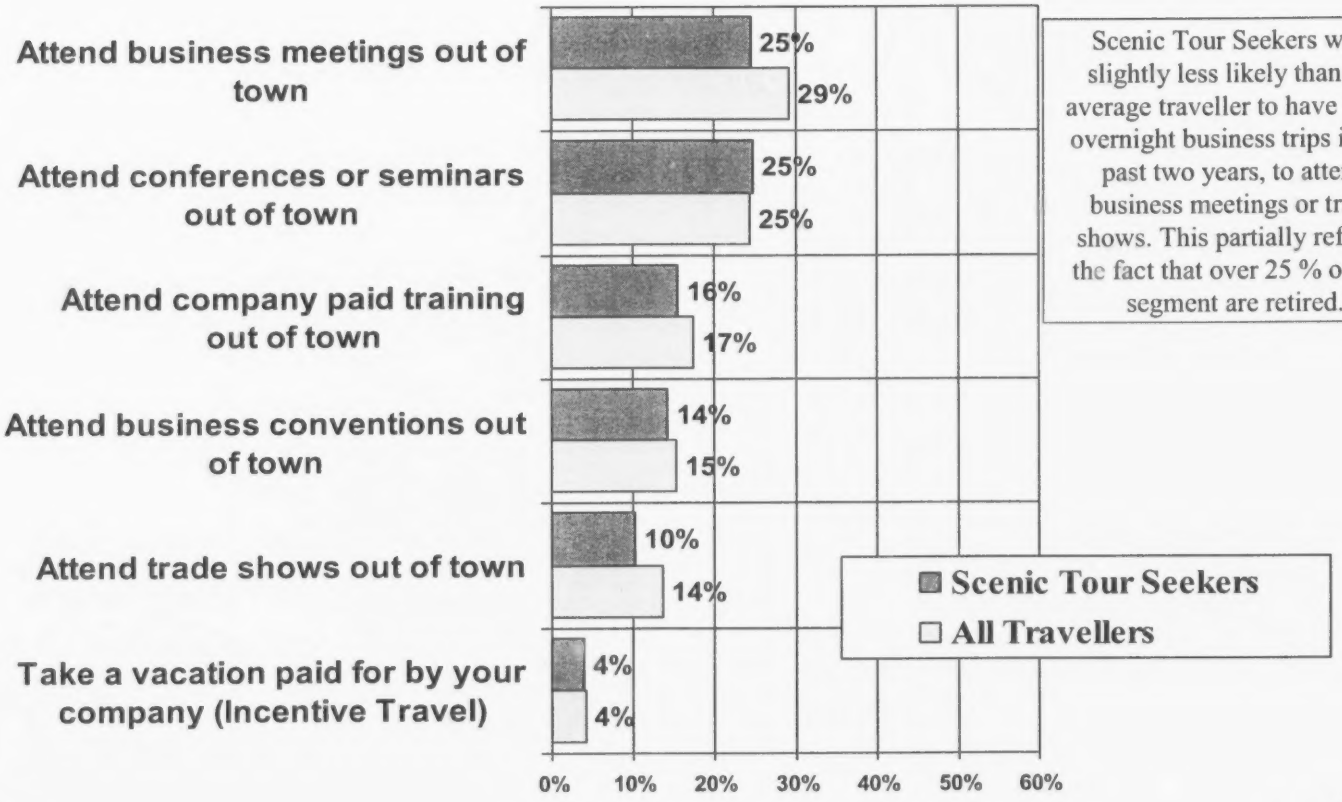
Technical Note

This analysis is based on a factor analysis of the same day and overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Percent Taking Various Types of Overnight Business Trip During Past Two Years

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

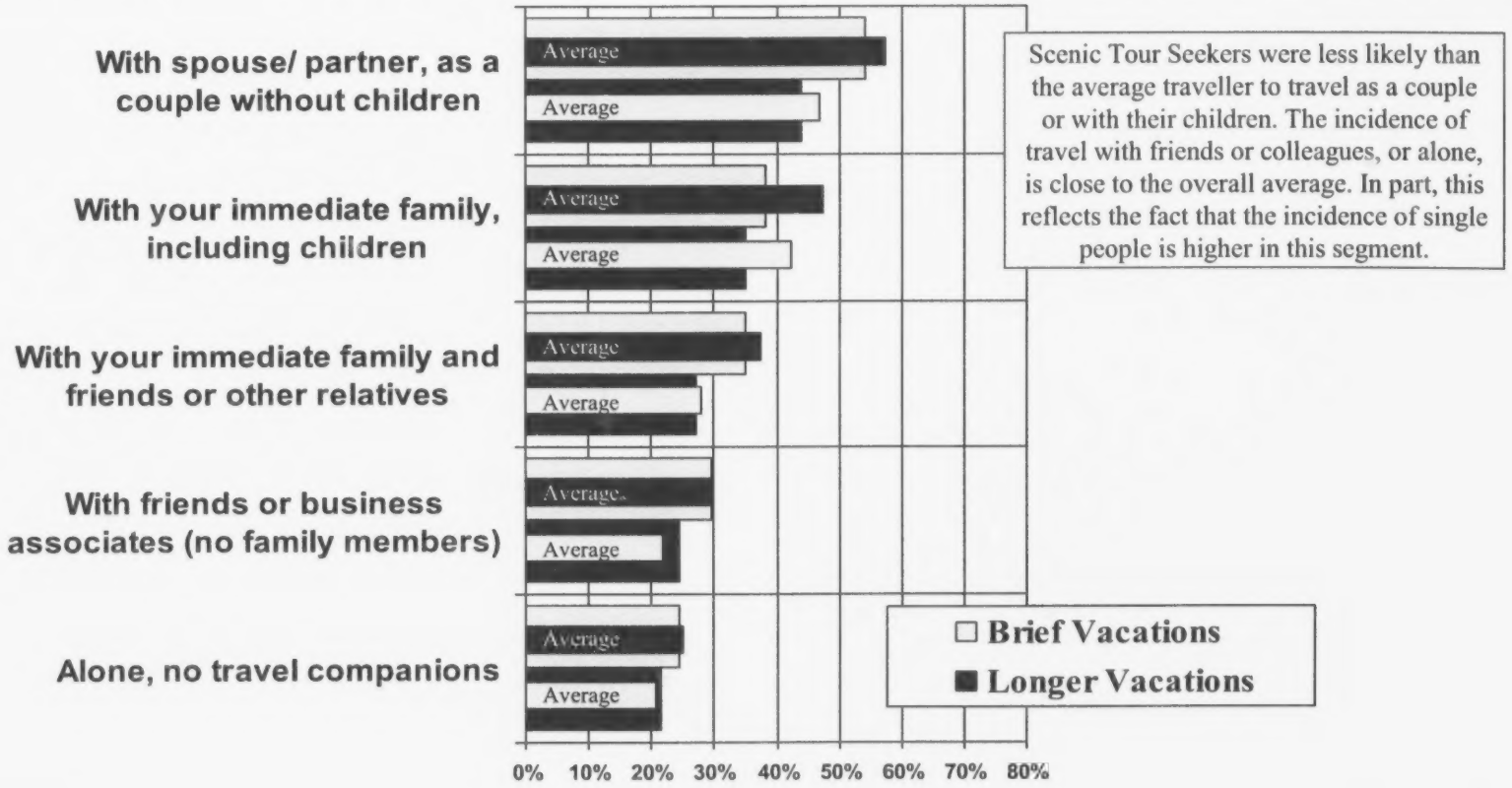


Scenic Tour Seekers were slightly less likely than the average traveller to have taken overnight business trips in the past two years, to attend business meetings or trade shows. This partially reflects the fact that over 25 % of this segment are retired.

Composition of Travel Party for Brief and Longer Trips During Past Two Years

Scenic Tour Seekers

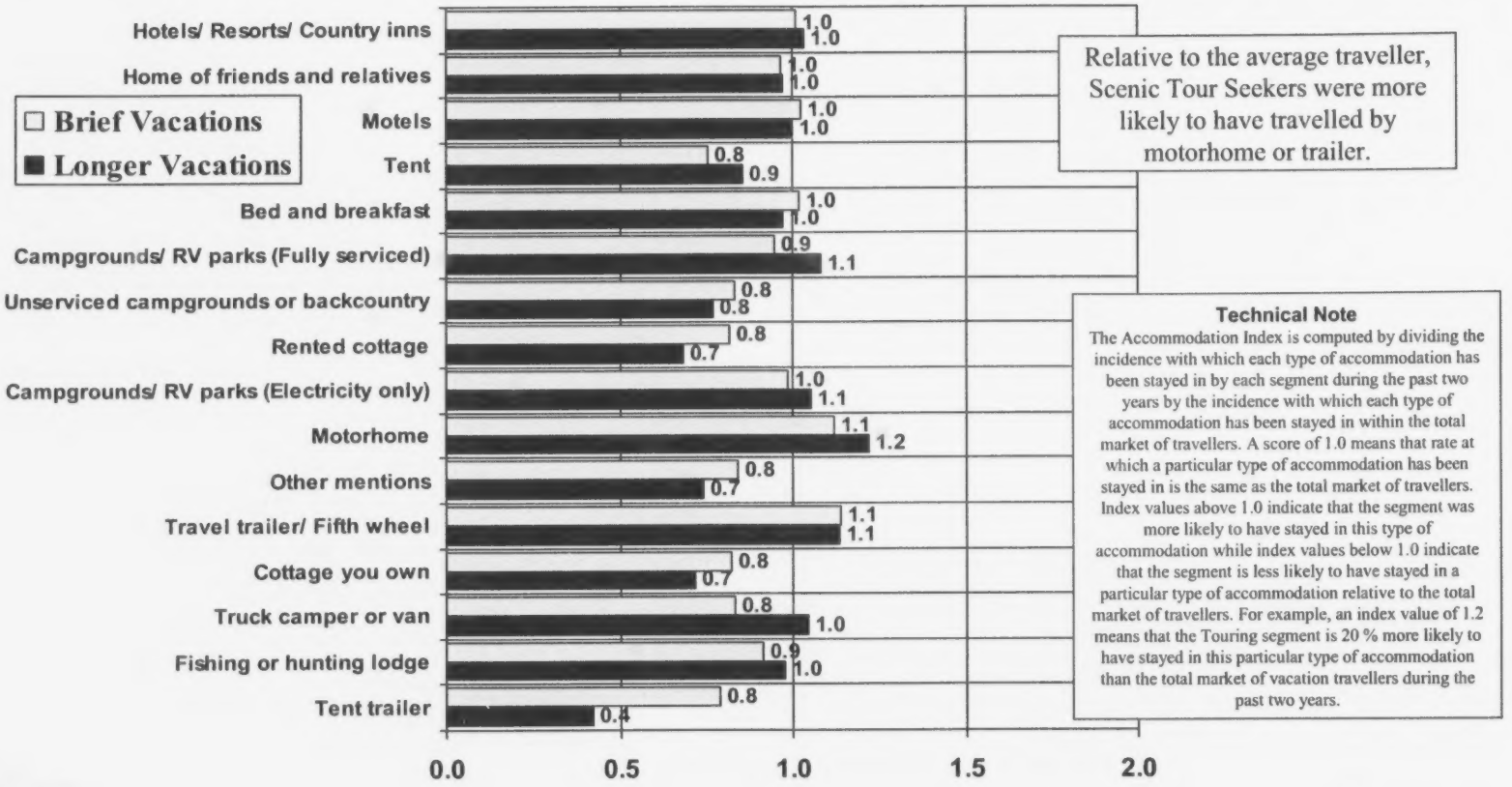
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Types of Accommodations Used for Brief and Longer Trips During Past Two Years (Indexed)

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the average traveller, Scenic Tour Seekers were more likely to have travelled by motorhome or trailer.

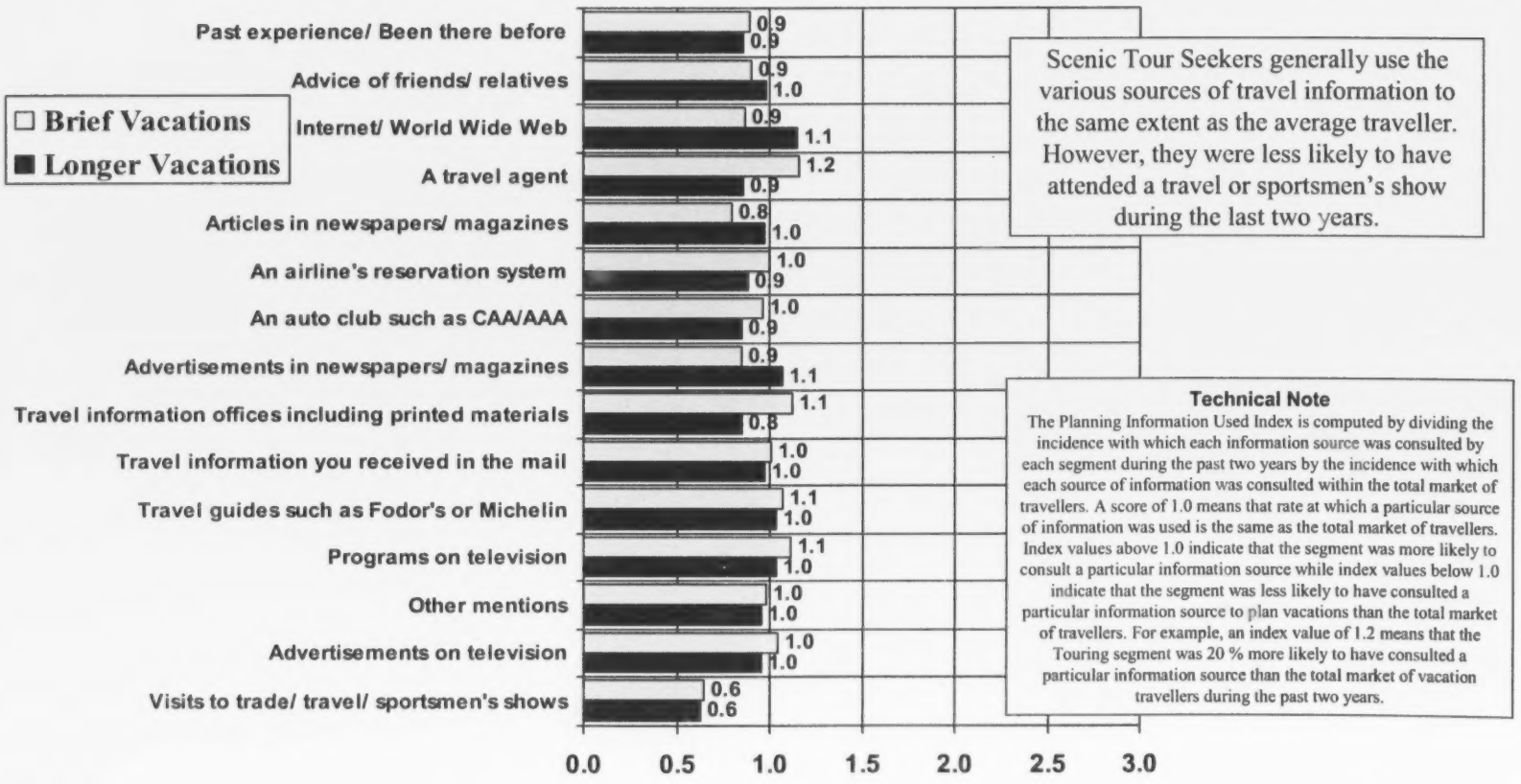
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to have stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of vacation travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past Two Years (Indexed)

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Scenic Tour Seekers generally use the various sources of travel information to the same extent as the average traveller. However, they were less likely to have attended a travel or sportsmen's show during the last two years.

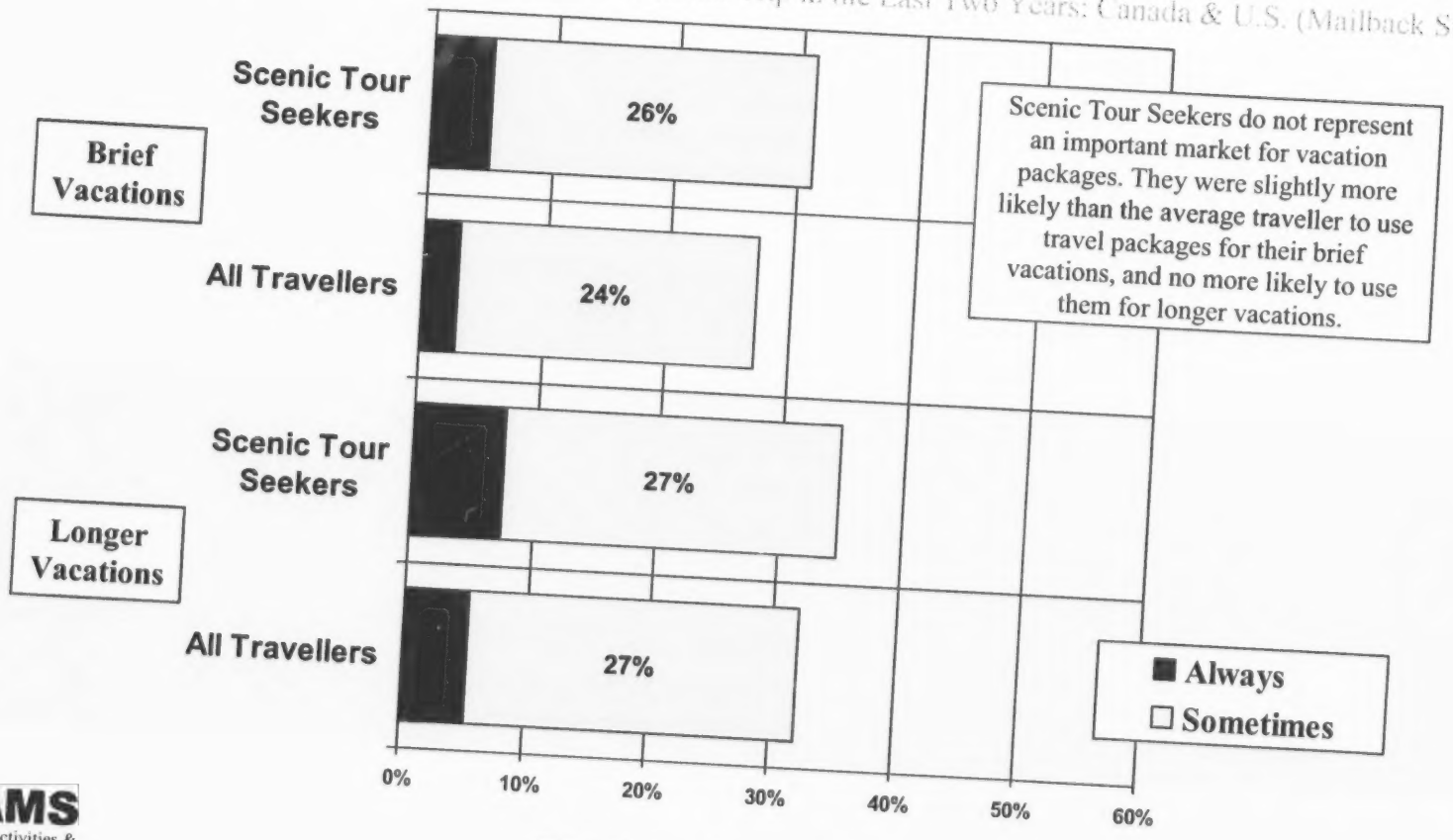
Technical Note

The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of travellers. For example, an index value of 1.2 means that the Touring segment was 20 % more likely to have consulted a particular information source than the total market of vacation travellers during the past two years.

How Often Travel Packages Used for Brief and Longer Vacations During Past Two Years

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



TAMS
Travel Activities & Motivation Survey

TAMS: Touring Segmentation

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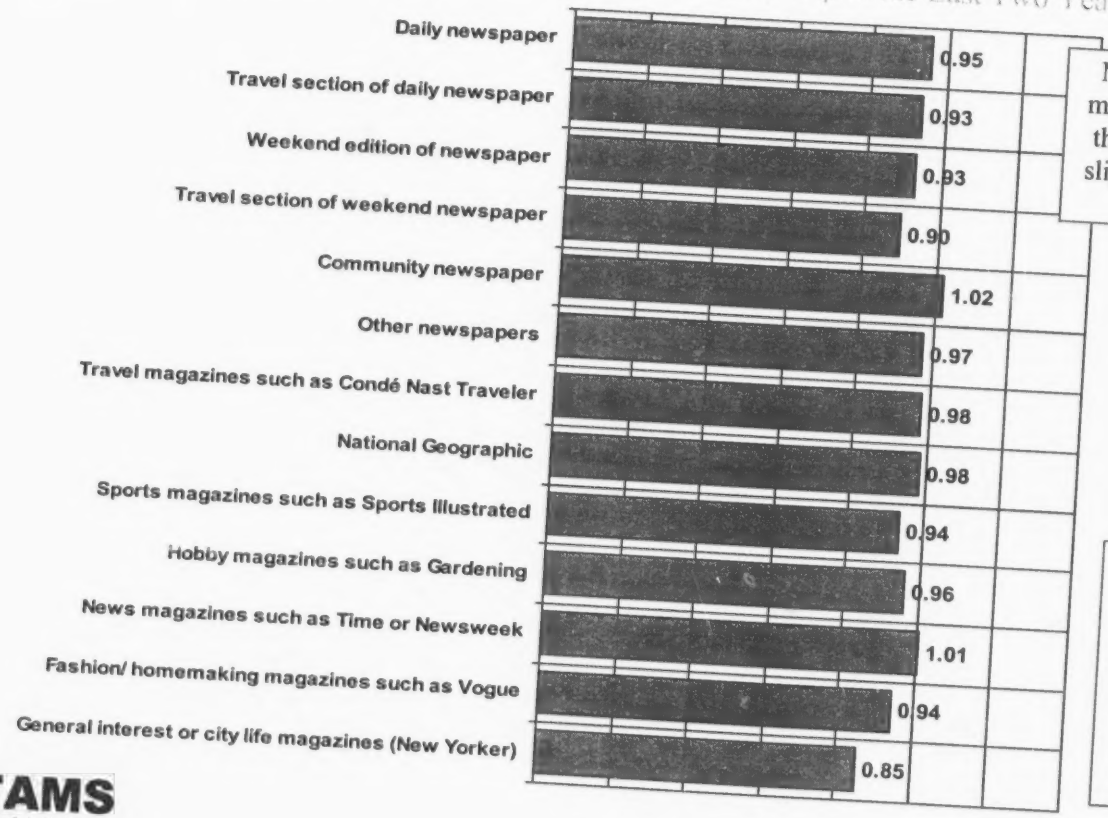
Media Index for Print Media: Canada & United States

Scenic Tour Seekers

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Travellers
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that Scenic Tour Seekers were average, or slightly below average, consumers of most types of print publications.

Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that Scenic Tour Seekers were 20 % more likely to read a particular publication than the total market of vacation travellers.

TAMS
Travel Activities & Motivation Survey

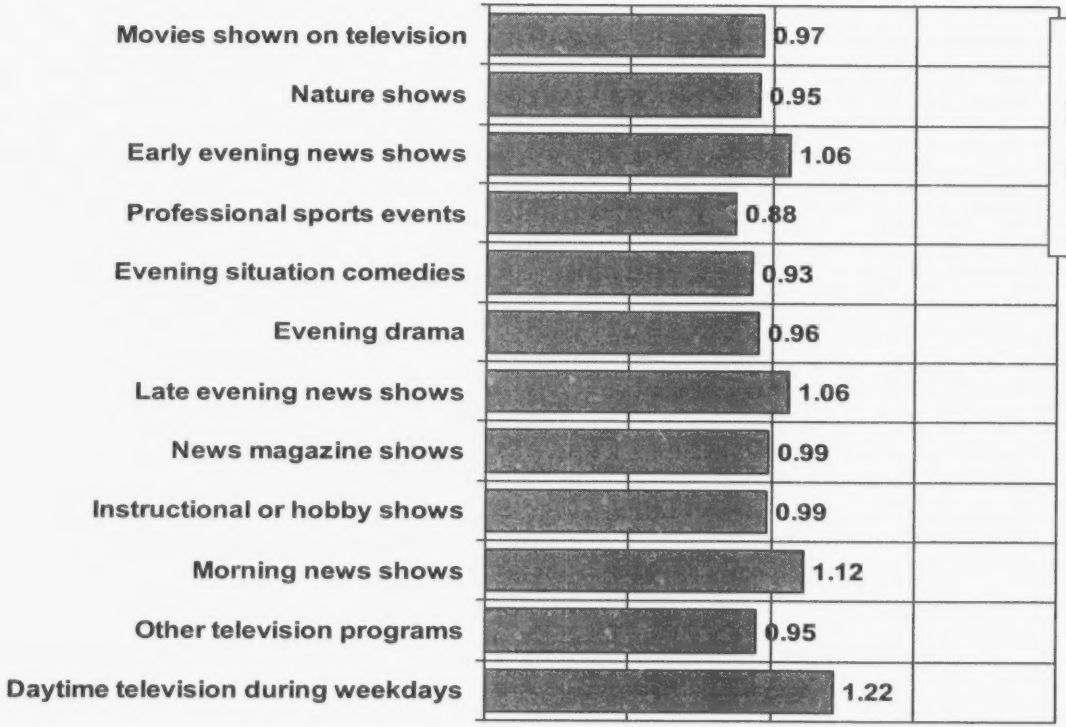
TAMS: Touring Segmentation

Lang RESEARCH

Media Index for Television Programming: Canada & United States

Scenic Tour Seekers

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Travellers
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Scenic Tour Seekers were also average viewers of most types of television programming, but were more likely than the average traveller to watch daytime television during weekdays. Once again, this reflects the fact that many within this segment are retired.

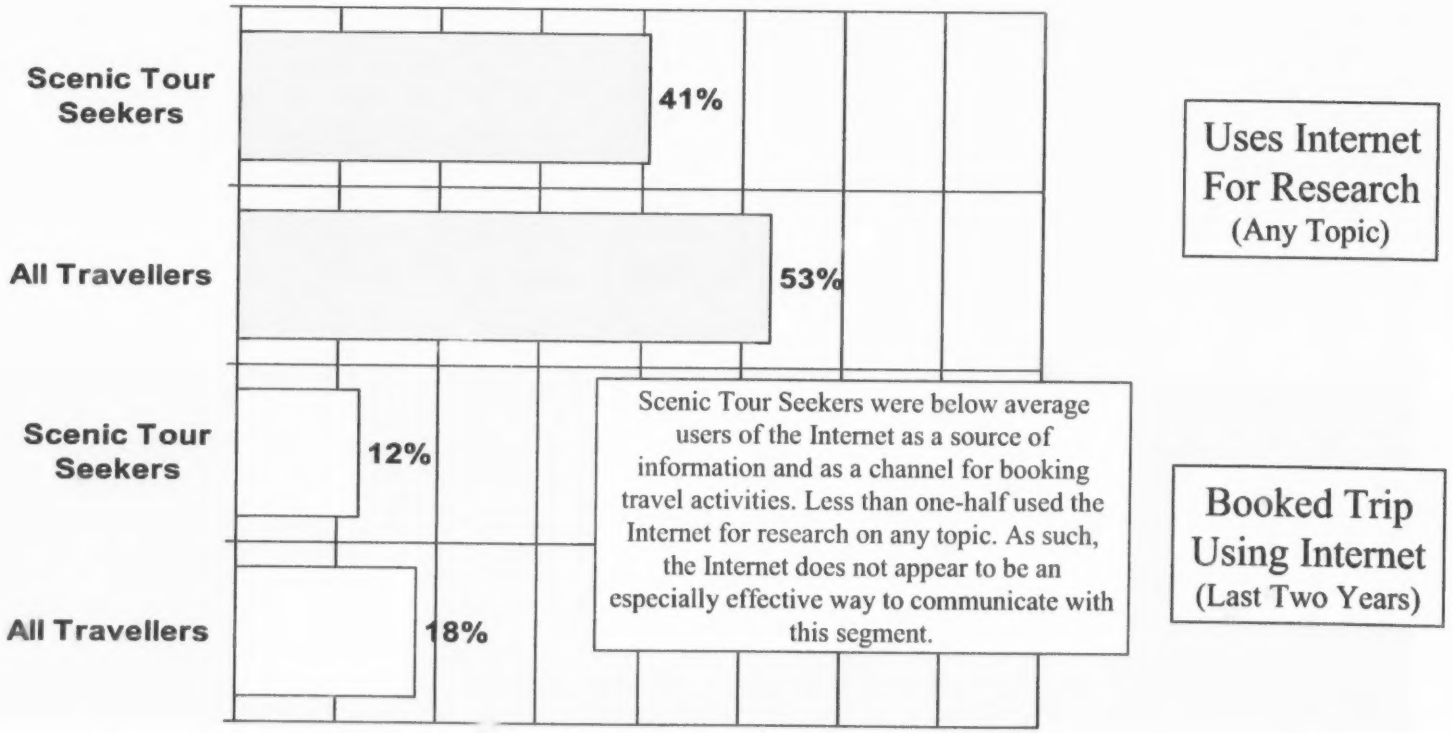
Technical Note

The Media Index is computed by dividing the percent within each segment routinely watching each program by the percent in the total market who routinely watches each program. A score of 1.0 means that viewership is the same as the total market. Index values above 1.0 indicate that the viewership is above average while index values below 1.0 indicate that viewership is below average. For example, an index value of 1.2 means that Scenic Tour Seekers were 20 % more likely to watch a particular program than the total market of vacation travellers.

Percent Using Internet and Booking At Least One Trip Using the Internet

Scenic Tour Seekers

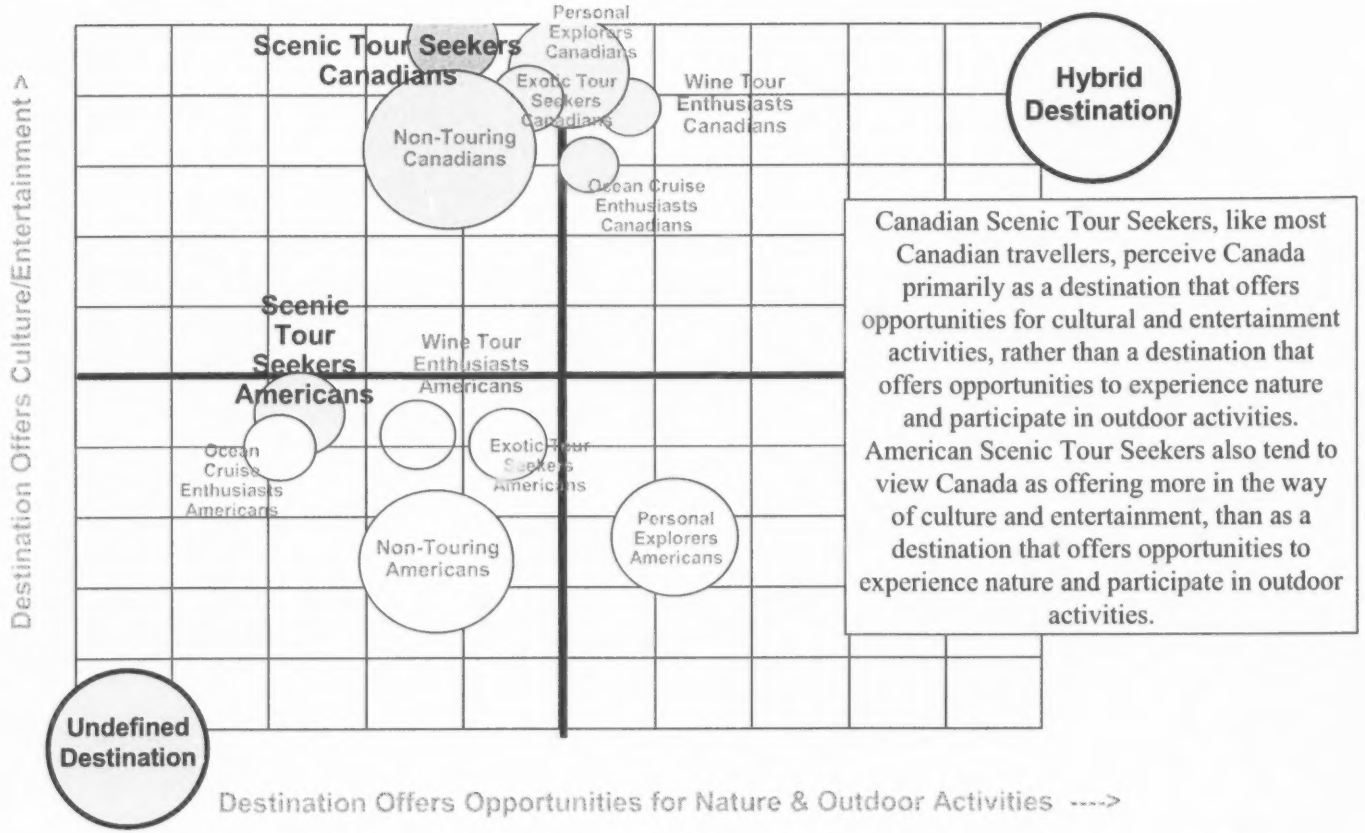
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Vacation Imagery of Canada

Scenic Tours Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment

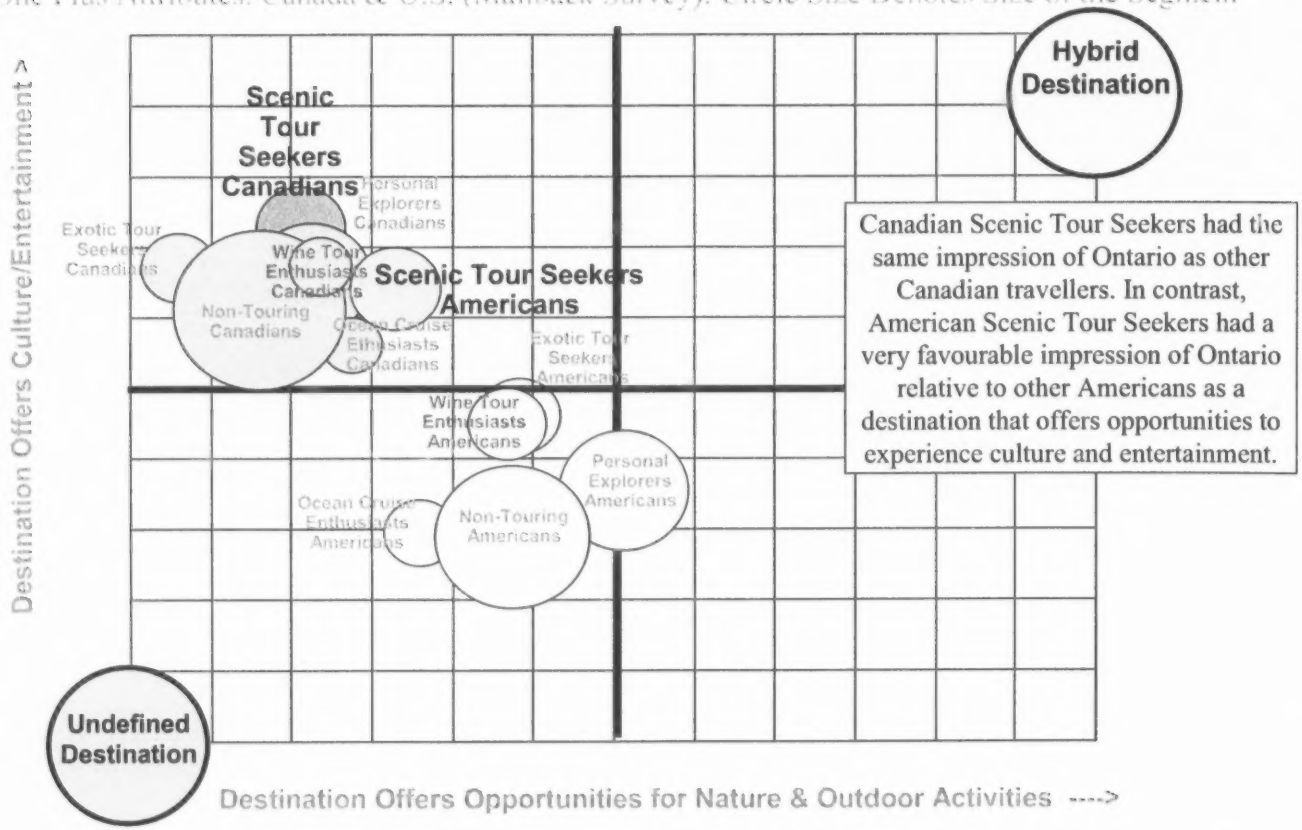


Canadian Scenic Tour Seekers, like most Canadian travellers, perceive Canada primarily as a destination that offers opportunities for cultural and entertainment activities, rather than a destination that offers opportunities to experience nature and participate in outdoor activities. American Scenic Tour Seekers also tend to view Canada as offering more in the way of culture and entertainment, than as a destination that offers opportunities to experience nature and participate in outdoor activities.

Vacation Imagery of Ontario

Scenic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment

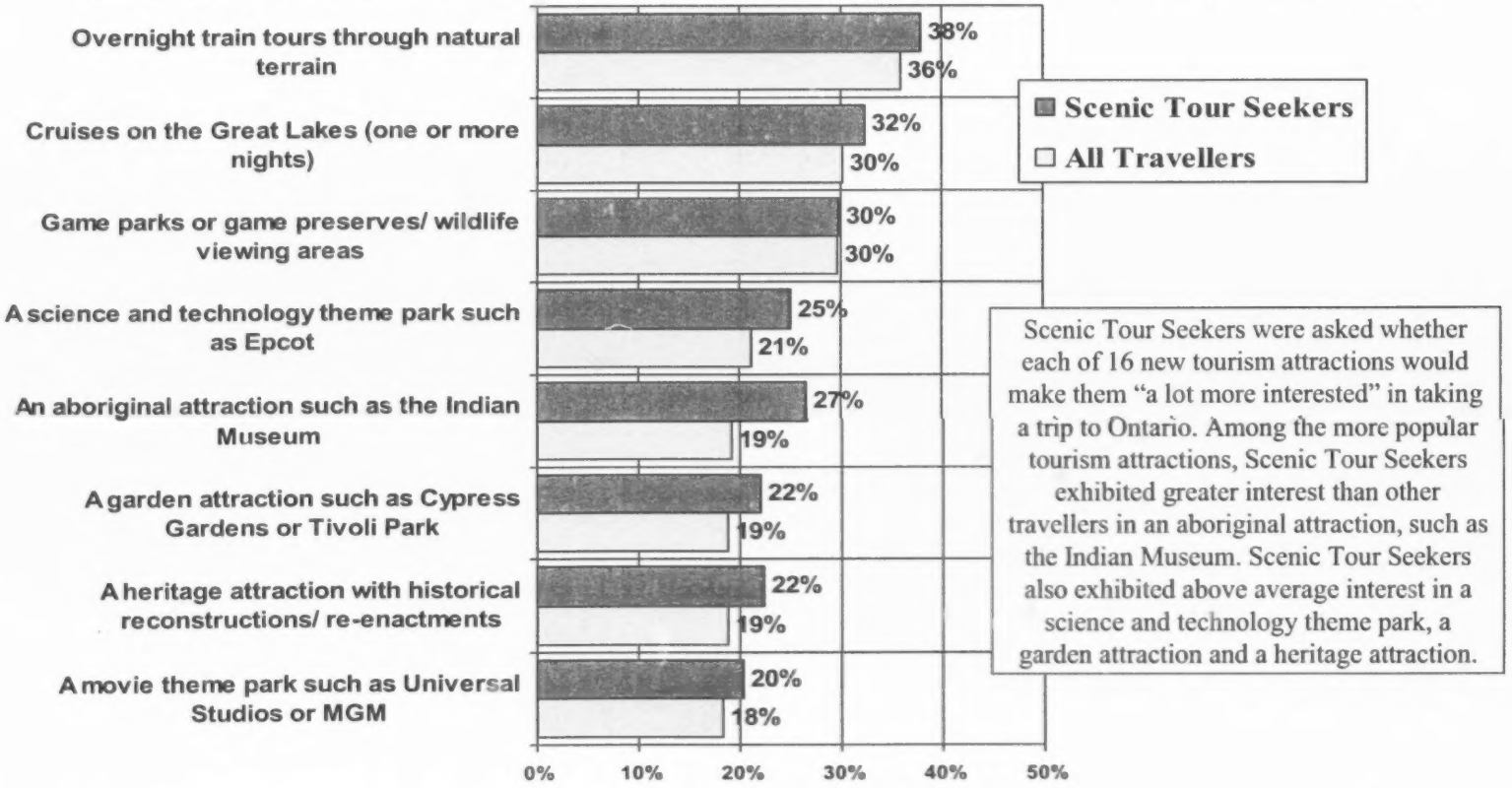


Canadian Scenic Tour Seekers had the same impression of Ontario as other Canadian travellers. In contrast, American Scenic Tour Seekers had a very favourable impression of Ontario relative to other Americans as a destination that offers opportunities to experience culture and entertainment.

Interest in New Tourism Products

Scenic Tour Seekers (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

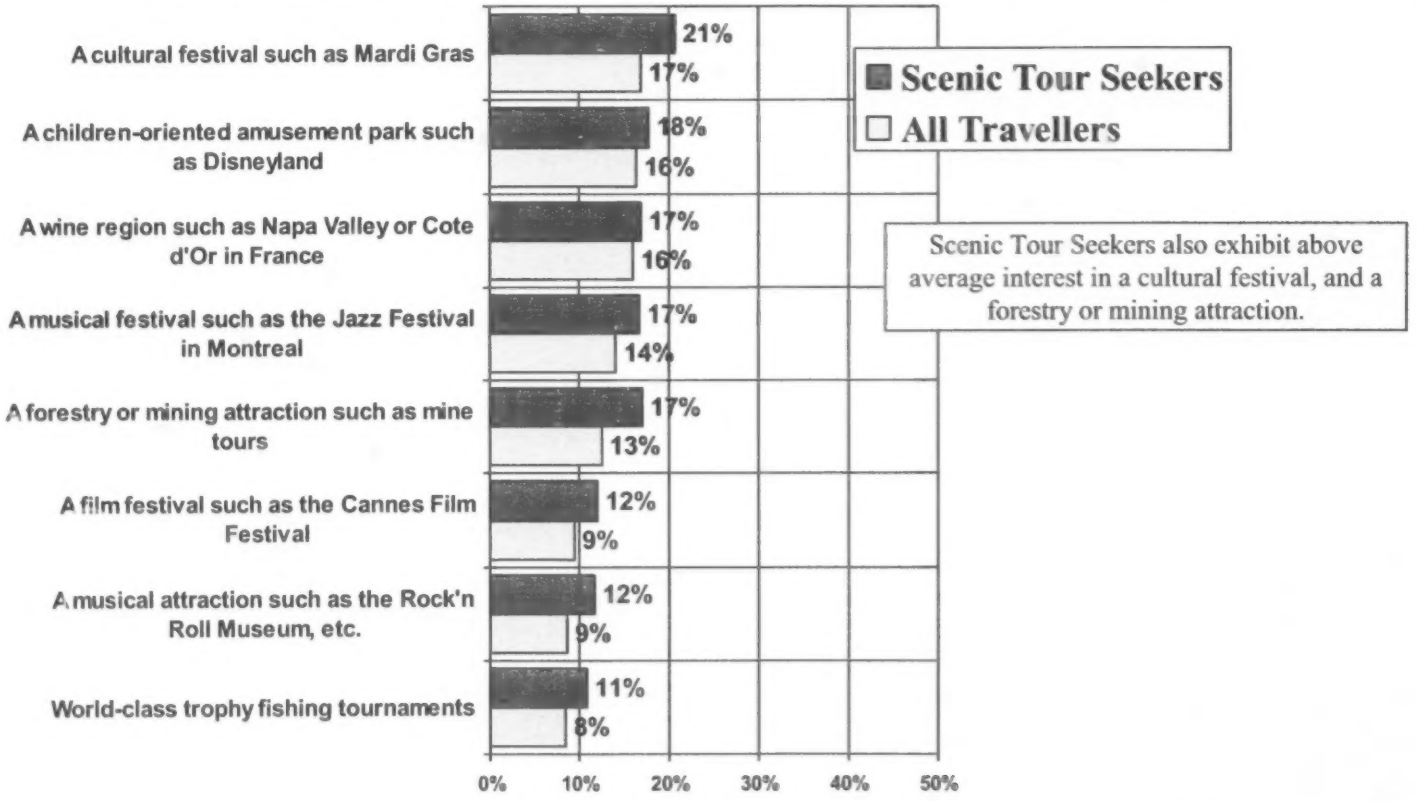


Scenic Tour Seekers were asked whether each of 16 new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, Scenic Tour Seekers exhibited greater interest than other travellers in an aboriginal attraction, such as the Indian Museum. Scenic Tour Seekers also exhibited above average interest in a science and technology theme park, a garden attraction and a heritage attraction.

Interest in New Tourism Products

Scenic Tour Seekers (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Section Five

Personal Explorers

Detailed Segment Profile

Personal Explorers

Personal Explorers are the largest of the touring segments, accounting for 23.0 % of Canadian travellers and 24.2 % of American travellers. They are younger (average age is 43.9 years) than other touring travellers, and are more likely to be employed full time. They have above average household incomes and levels of education. Affluent Young Couples and Affluent Mature and Senior Couples were especially over-represented within this segment.

The size and travel activities of the Personal Explorers make this a prime segment for Canada. Relative to average travellers, Canadian Personal Explorers were more likely to have travelled domestically and American Personal Explorers were more likely to have visited Canada during the past two years. Moreover, both Canadian (83%) and American Personal Explorers (47%) were more likely to expect to vacation in Canada during the next two years. Personal Explorers are also more likely to travel during all four seasons of the year than the average traveller.

Personal Explorers sought out a broad range of vacation experiences during the past two years. They were especially likely to have sought out exploratory vacation experiences, and frequently use their vacations as opportunities for romance and relaxation. They were also more likely than the average traveller to have used their travel for personal indulgence, to participate in a sport or hands-on learning experience, or to socialize with family and friends.

Personal Explorers are also quite active in a number of outdoor activities including natural sightseeing, canoeing, kayaking and hiking. Their prime cultural and entertainment pursuits while travelling included shopping and dining, and visiting museums, art exhibits and historical sites.

Personal Explorers tour almost exclusively by personal vehicle. With the exception of a marked interest in wine tours, they were less likely than average to embark on other types of day or overnight touring activities. Travel packages also were less often purchased by Personal Explorers than by other travellers.

Personal Explorers were not likely to choose the most luxurious vacation accommodations, but rather appear to prefer a cottages (either rented or one that they own), camping, and B&Bs. They exhibit a decided interest in nature, both in terms of the accommodations they stay in, and in the types of outdoor pursuits they participate in.

Personal Explorers consulted a wide variety of sources when researching their vacations, including travel guidebooks, travel or sportsmen's shows, newspaper or magazine ads, and material from travel information offices/auto clubs. They also were more likely than the average traveller to use the Internet for general information and to book their travel.

Personal Explorers

Key Demographic Characteristics

Personal Explorers represent 23.0 % of Canadian travellers and 24.2 % of American travellers and are the largest of the six touring segments. They were 44 years old on average, making them the youngest of the Touring segments. They tend to be well-educated, with above average household incomes. This segment is over-represented by Mature Couples and Young Couples, indicating that personal exploration tends to be more common among couples who travel without children.

Percent of Total Population:	20.3 % [Canada]; 21.4 % [United States]
Percent of Travellers:	23.0 % [Canada]; 24.2 % [United States]
Number of Individuals in Segment:	3,984,486 [Canada]; 36,676,067 [United States]
Average Age/Dominant Age Range:	43.9 years old; 26 to 55 (69.4 %)
Dominant Life Cycle Stages:	Mature Couples [Index 122; 24.4 %]
	Young Couples [Index 114; 7.5 %]
Household Income:	$60,500; 24.9 % HHI of $80K or more
Percent with Post-Secondary Education:	58.1 % University/College; 70.6 % Advanced Degrees
Dominant Occupation Status:	60.5 % Employed; 13.2 % Self-employed; 12.4 % Retired

Technical Note
See Appendix One for a description of each of the life cycle stages.

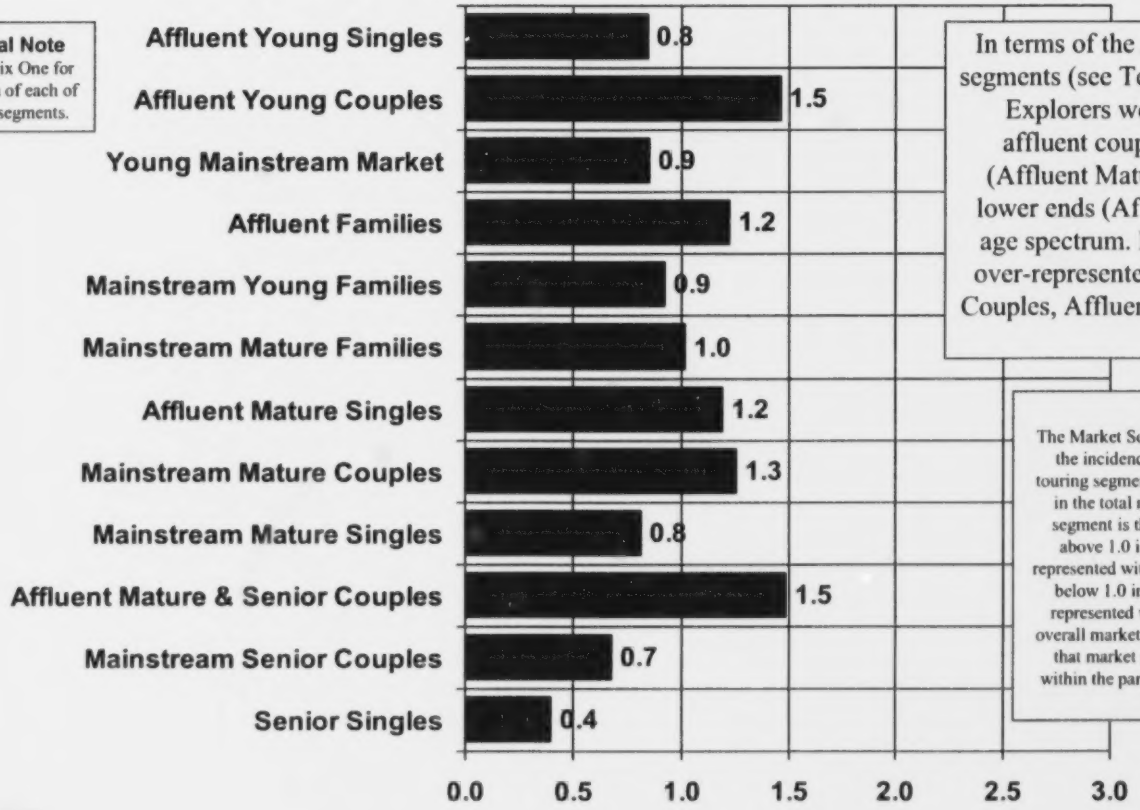
Touring Segmentation: Market Segment Indexing

Personal Explorers

Distribution of Market Segments within Personal Explorers Segment Divided By Distribution of Market Segments in Total Population

Base: Adult (18 Plus) U.S./Canadian Population Who Took a Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



In terms of the demographic lifespan market segments (see Technical Note below), Personal Explorers were much more likely to be affluent couples, both at the upper ends (Affluent Mature and Senior Couples) and lower ends (Affluent Young Couples) of the age spectrum. Personal Explorers were also over-represented among Mainstream Mature Couples, Affluent Mature Singles and Affluent Families.

Technical Note
The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular touring segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the touring segment while index values below 1.0 indicate that the market segment is under-represented within the touring segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to be found within the particular touring segment than in the general population.

TAMS
Travel Activities & Motivation Survey

TAMS: Touring Segmentation

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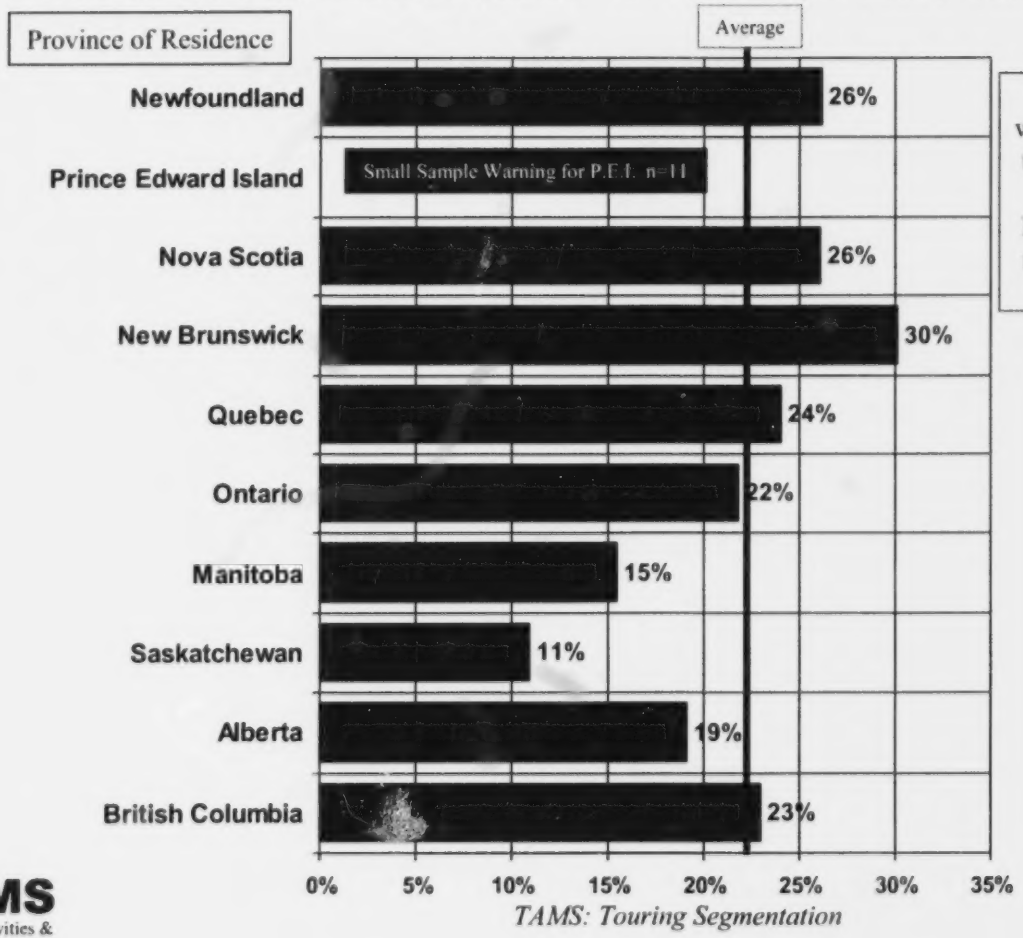
Touring Segment Incidence in Canada

Personal Explorers: By Province

Base: Adult (18 Plus) Canadian Population Who Took a Trip or Plans to Take a Trip in Past/Next Two Years



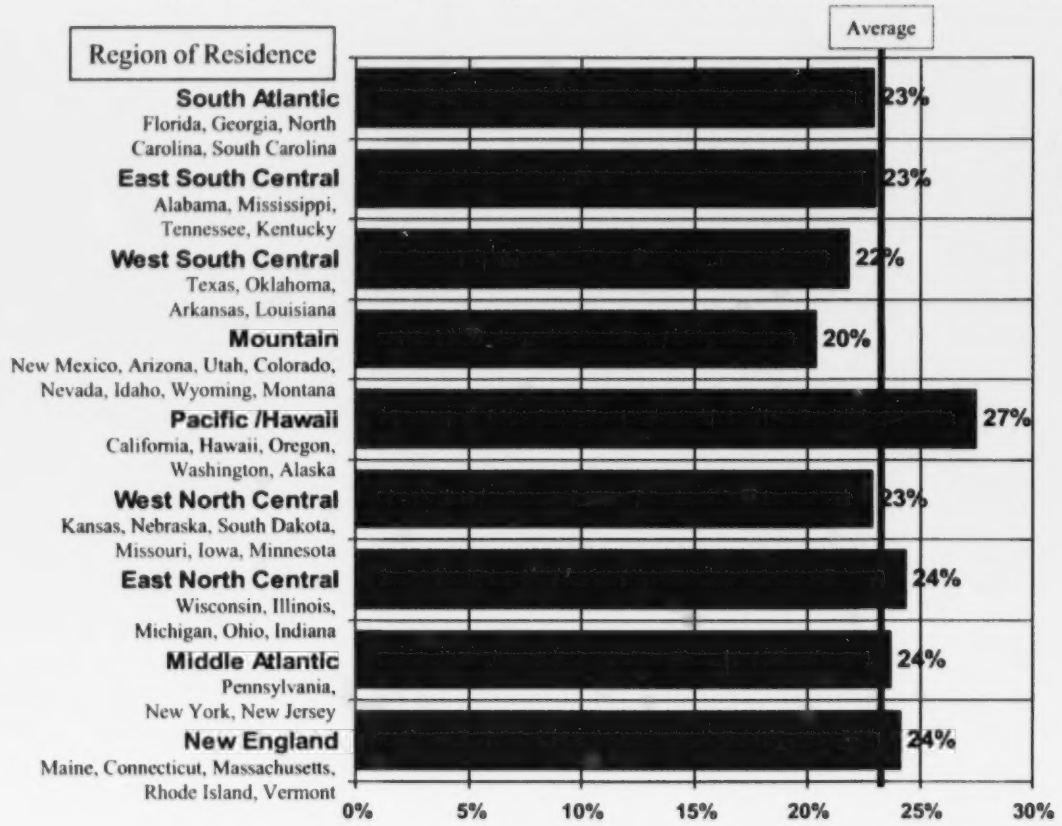
TAMS: Touring Segmentation

Among Canadians, Personal Explorers were more likely than the average traveller to be found in Atlantic Canada (including New Brunswick, Nova Scotia and Newfoundland). They were least likely to reside in the Prairie provinces (Manitoba, Saskatchewan and Alberta).

Touring Segment Incidence in United States

Personal Explorers: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took a Trip or Plans to Take a Trip in Past/Next Two Years

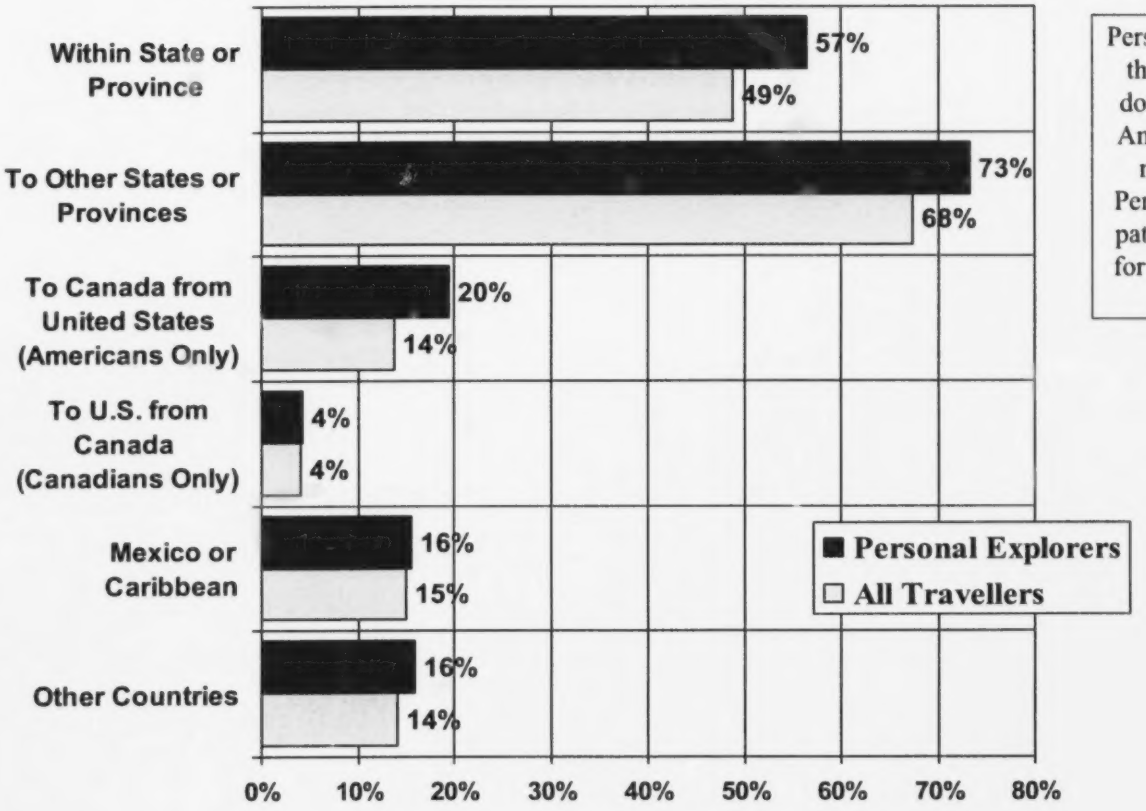


There was relatively little variation in the incidence of Personal Explorers across the nine regions of the United States. However, Personal Explorers were slightly more likely to reside in the Pacific/Hawaii region of the U.S.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Personal Explorers

Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years

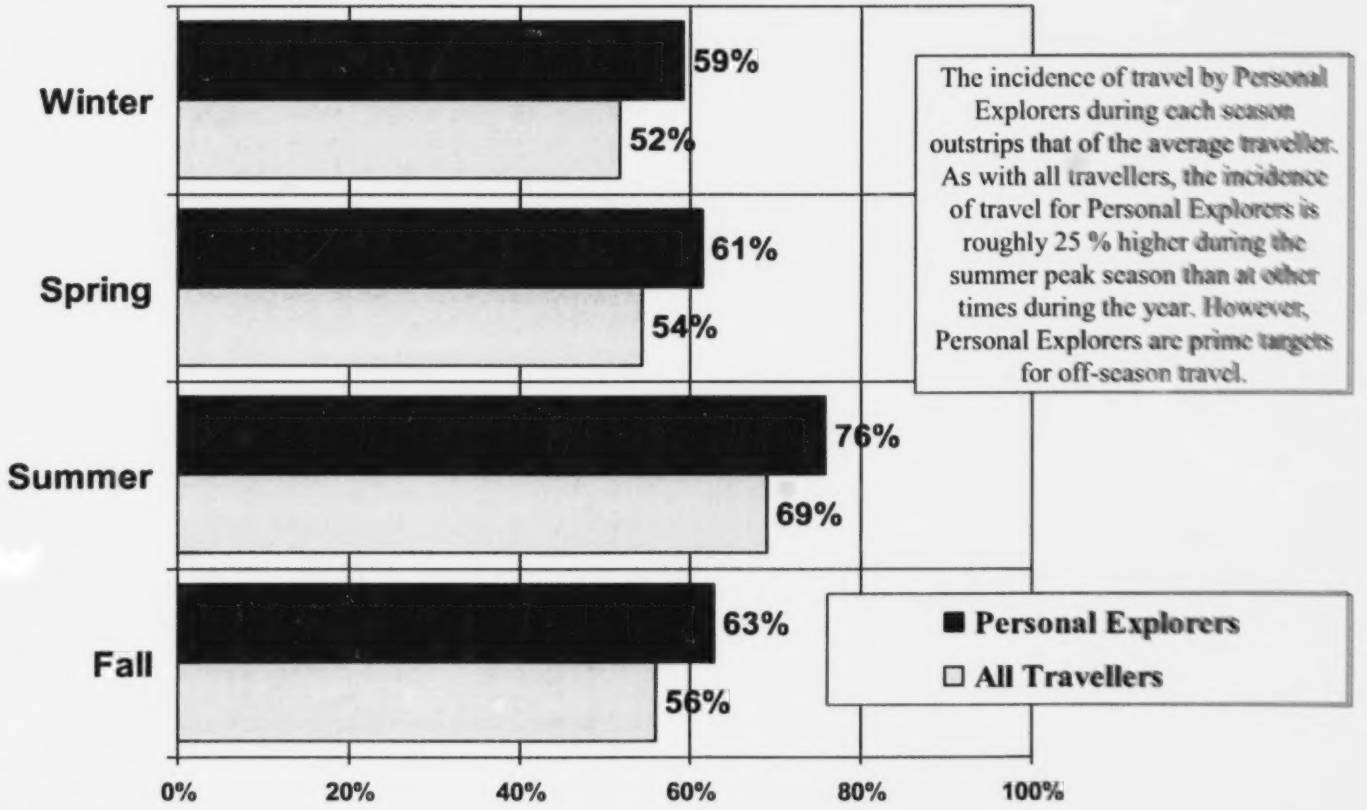


Personal Explorers were more likely than the average traveller to have travelled domestically within the past two years. American Personal Explorers were also more likely to have visited Canada. Personal Explorers have the same travel patterns as the typical vacation traveller for visits to Mexico or the Caribbean, or other international destinations.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past Two Years

Personal Explorers: Percent Taking Trip Each Season

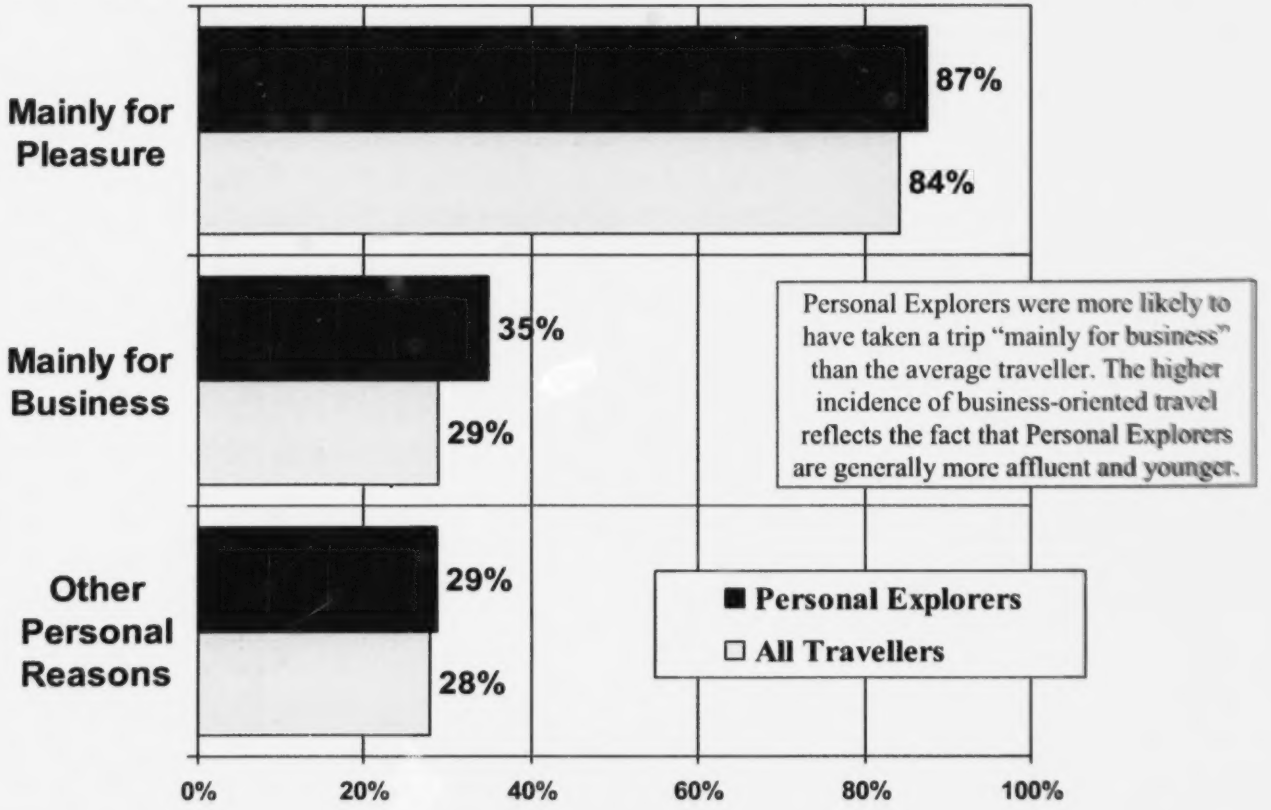
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years



Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past Two Years

Personal Explorers: Percent Taking Trip for Various Reasons

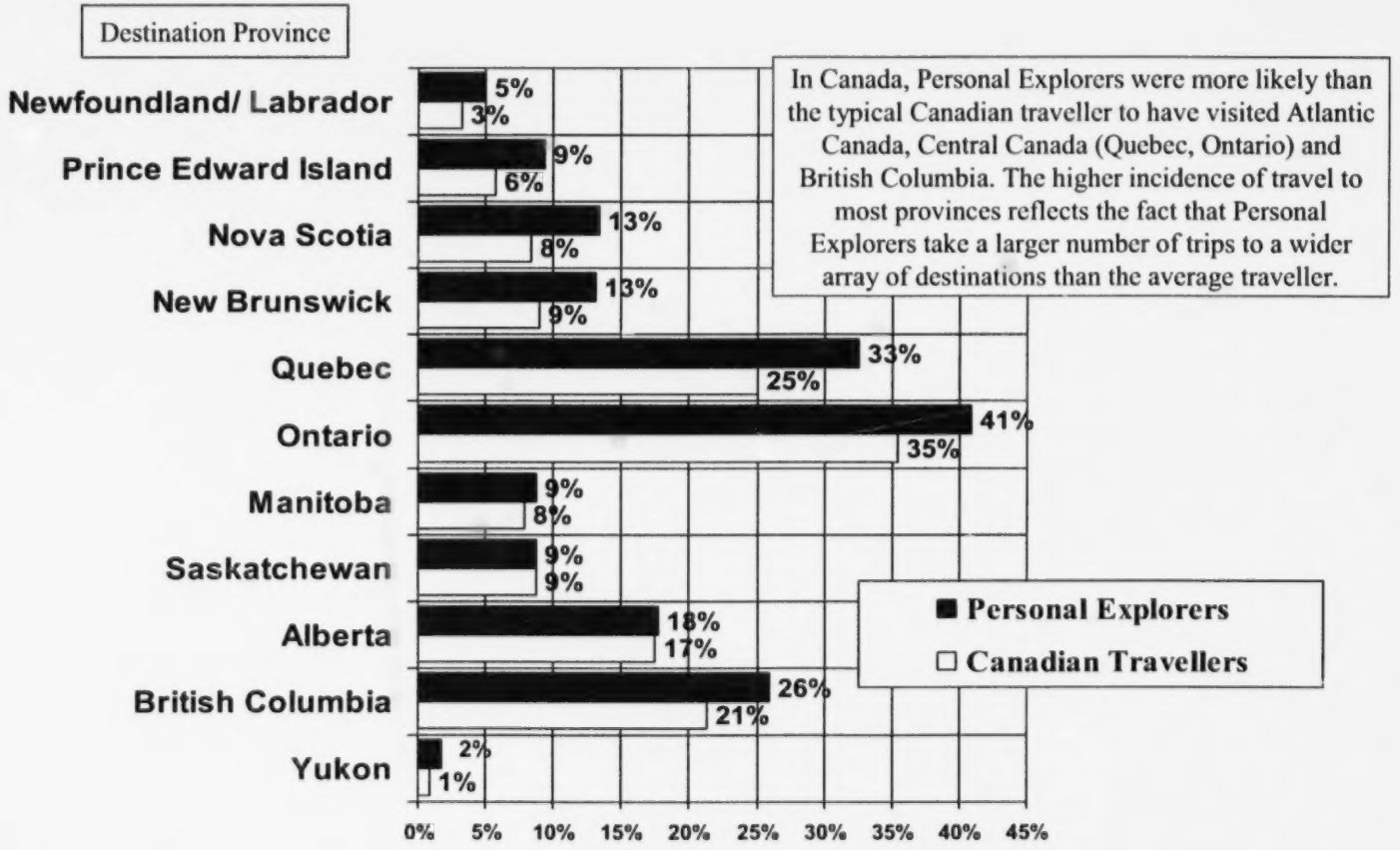
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past Two Years

Personal Explorers: Percent of Canadians Taking a Trip to Various Provinces

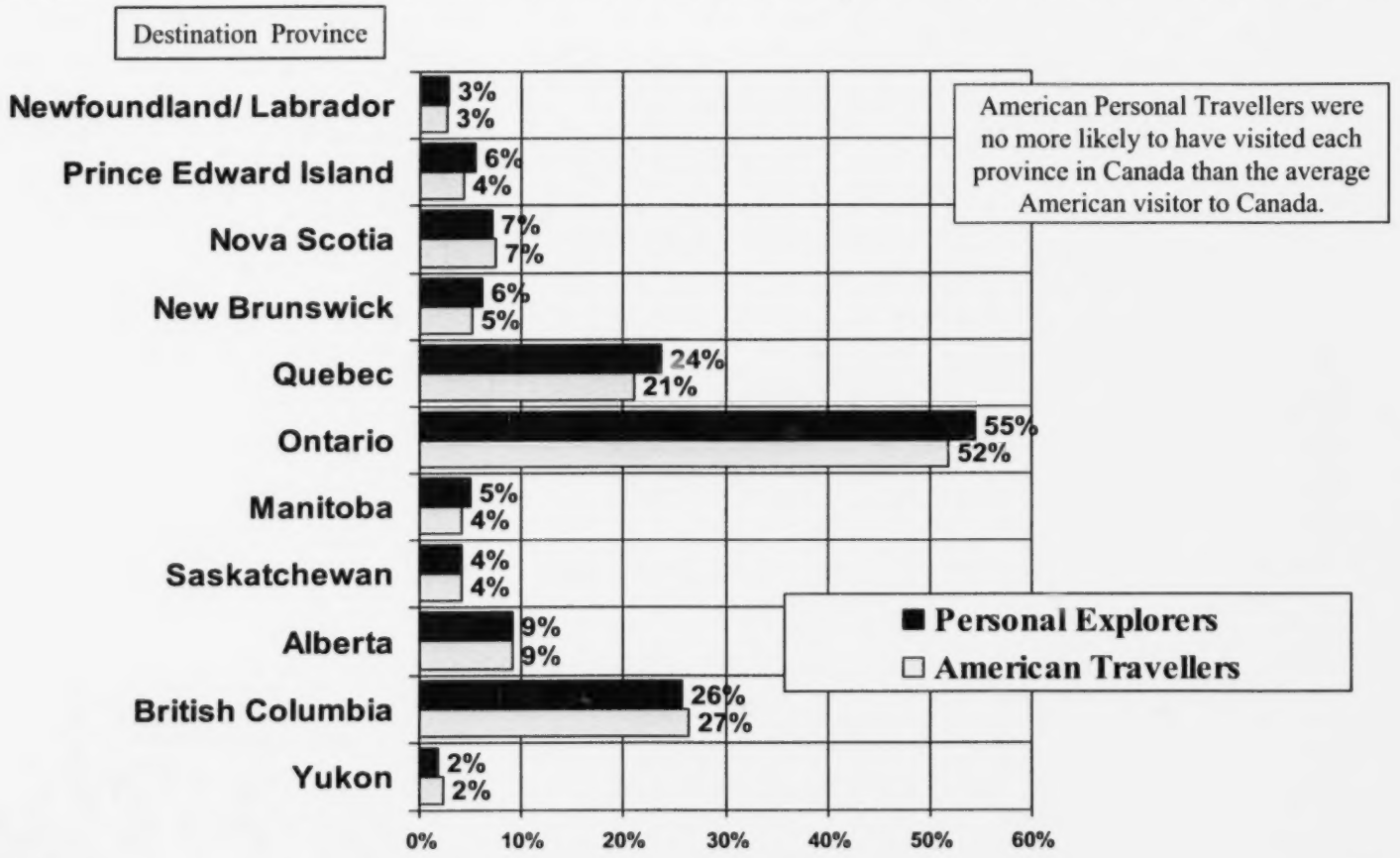
Base: Adult (18 Plus) Canadian Population Who Took a Vacation Trip and Trip Within Canada in the Past Two Years



Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past Two Years

Personal Explorers: Percent of Americans Taking a Trip to Various Provinces

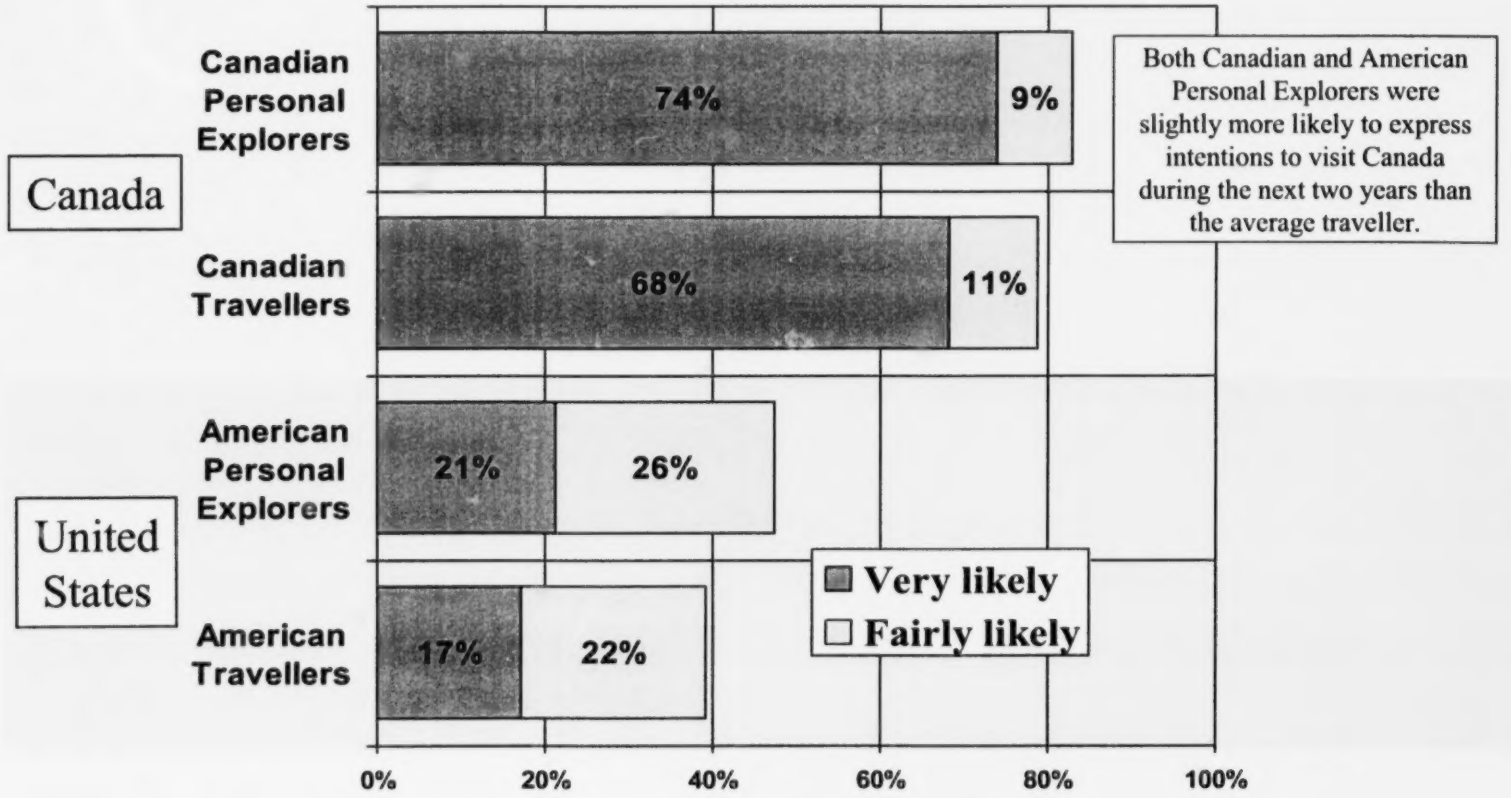
Base: Adult (18 Plus) U.S. Population Who Took a Vacation Trip and a Trip to Canada in the Past Two Years



Touring Segmentation

Personal Explorers: Intentions to Travel Within/To Canada Next Two Years

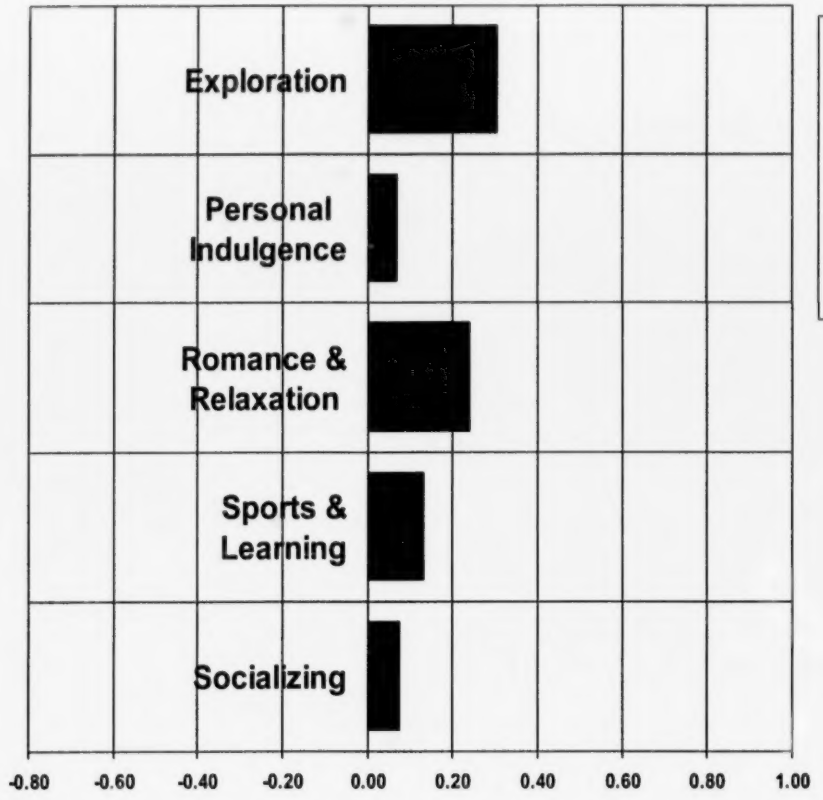
Base: Adult Population (18 Plus) Who Took a Vacation Trip in Last Two Years



General Vacation Experiences Sought During Pleasure Travel in the Past Two Years

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Personal Explorers sought out a wider range of vacation experiences than the average traveller. They were especially likely to have sought out exploratory vacation experiences, and to have taken trips for romance and relaxation. This latter pattern reflects the fact that Personal Explorers often travel as couples without children. Promoting destinations as offering opportunities for both romance and exploration will be the most effective way to attract this segment.

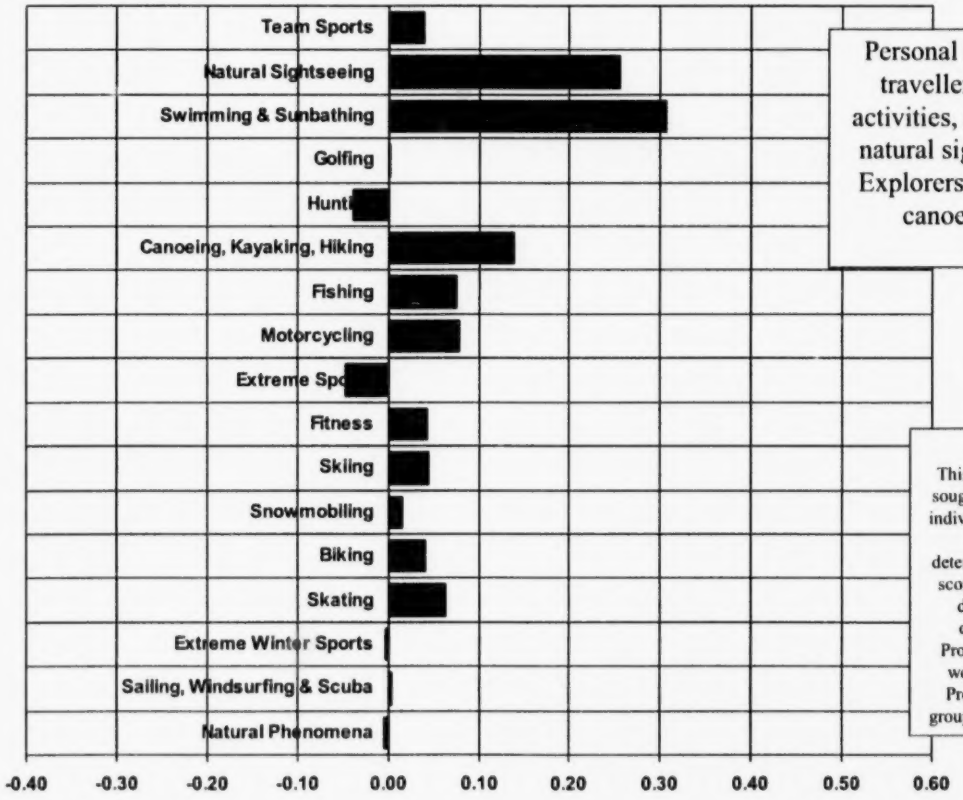
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past Two Years

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Personal Explorers were more likely than other travellers to enjoy the less energetic outdoor activities, such as swimming and sunbathing, and natural sightseeing. To a lesser extent, Personal Explorers were also more likely to participate in canoeing, kayaking, hiking, fishing, and motorcycling.

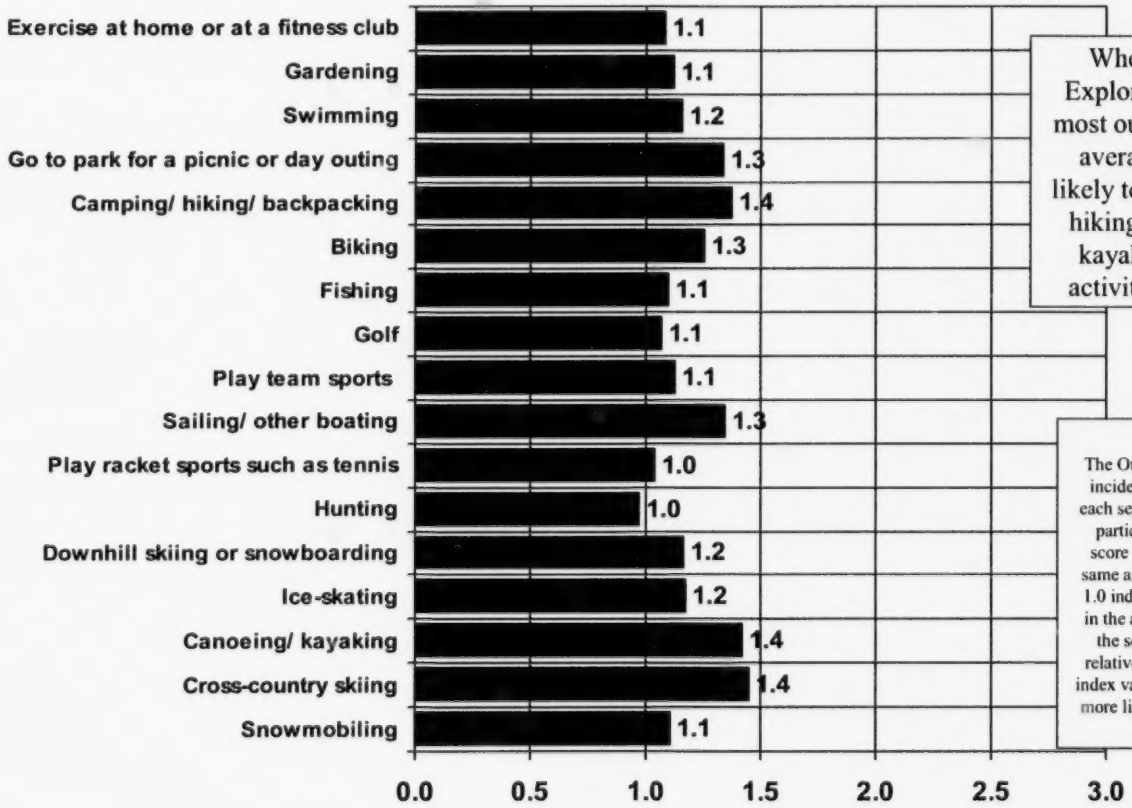
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



When not on vacation, Personal Explorers were moderately active in most outdoor pursuits. Relative to the average traveller, they were more likely to have participated in camping, hiking or backpacking, canoeing or kayaking, sailing or other boating activities, and cross-country skiing.

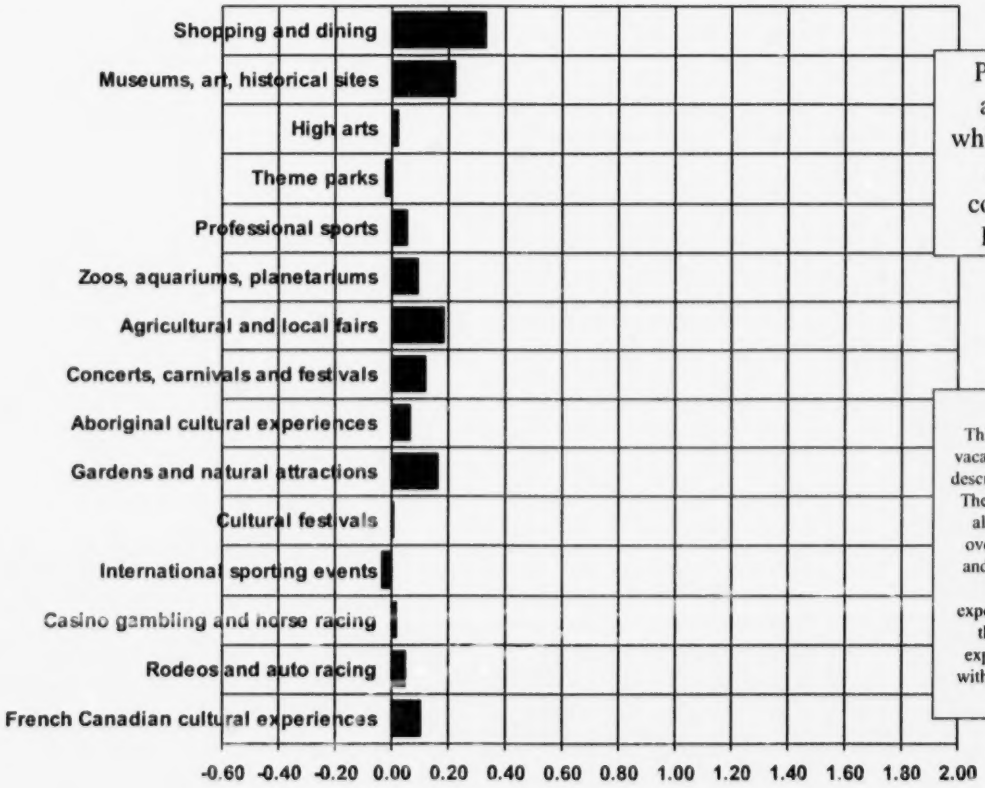
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to participate in a given activity than the total market of vacation travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past Two Years

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Personal Explorers were more likely than the average traveller to have shopped and dined while on vacation, and to have visited a museum, art gallery or historical site. This pattern is consistent with the interest shown by Personal Explorers in exploratory vacation activities.

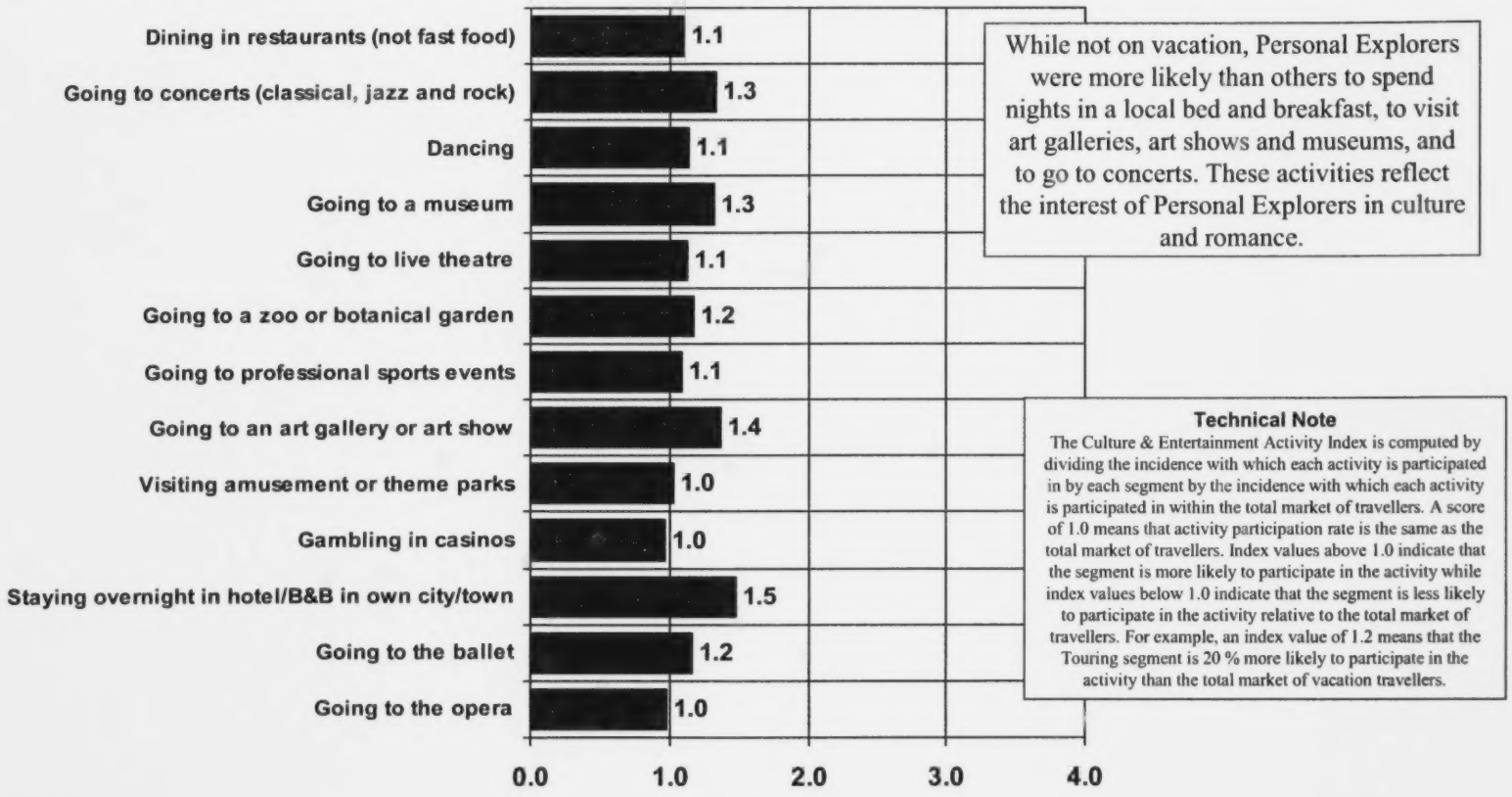
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Personal Explorers were more likely than others to spend nights in a local bed and breakfast, to visit art galleries, art shows and museums, and to go to concerts. These activities reflect the interest of Personal Explorers in culture and romance.

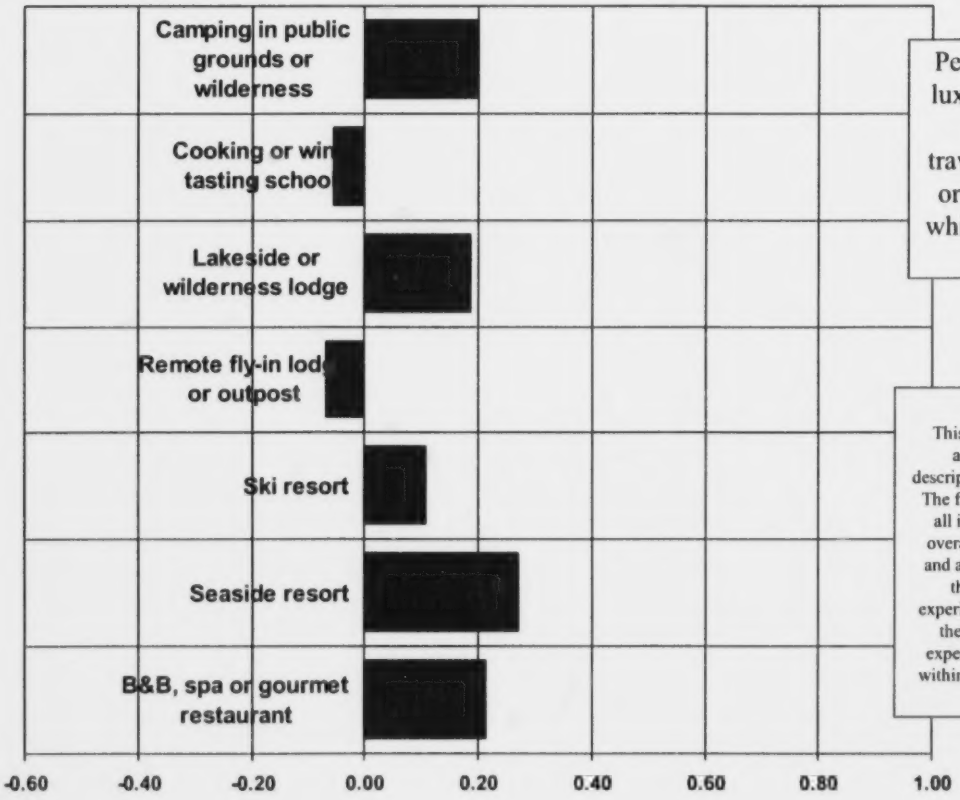
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to participate in the activity than the total market of vacation travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past Two Years

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Personal Explorers appear comfortable in both luxurious settings and more spartan conditions. While they were more likely than other travellers to stay at a seaside resort, a B&B, spa or gourmet restaurant (with accommodations) while on vacation, they were also more likely to camp out or stay at a wilderness lodge.

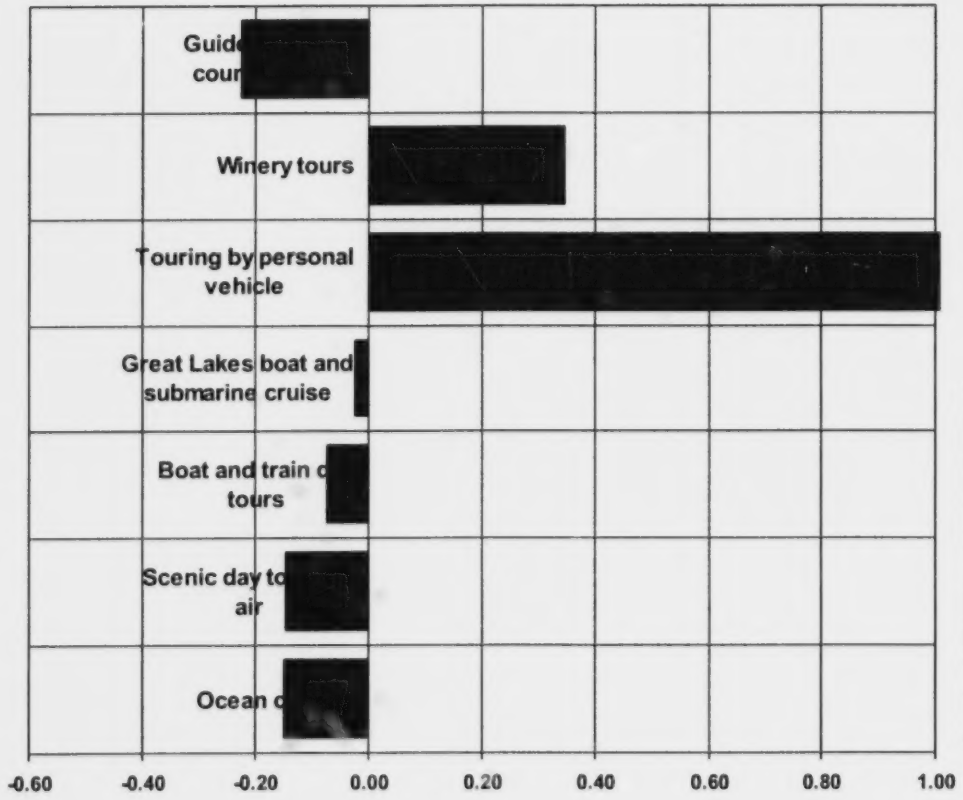
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past Two Years

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Personal Explorers overwhelmingly opted for the freedom of touring by personal vehicle while on vacation. They also exhibited above average interest in wine tours. On the other hand, they were less likely to have taken guided tours, tours by boat, train or air, or an ocean cruise.

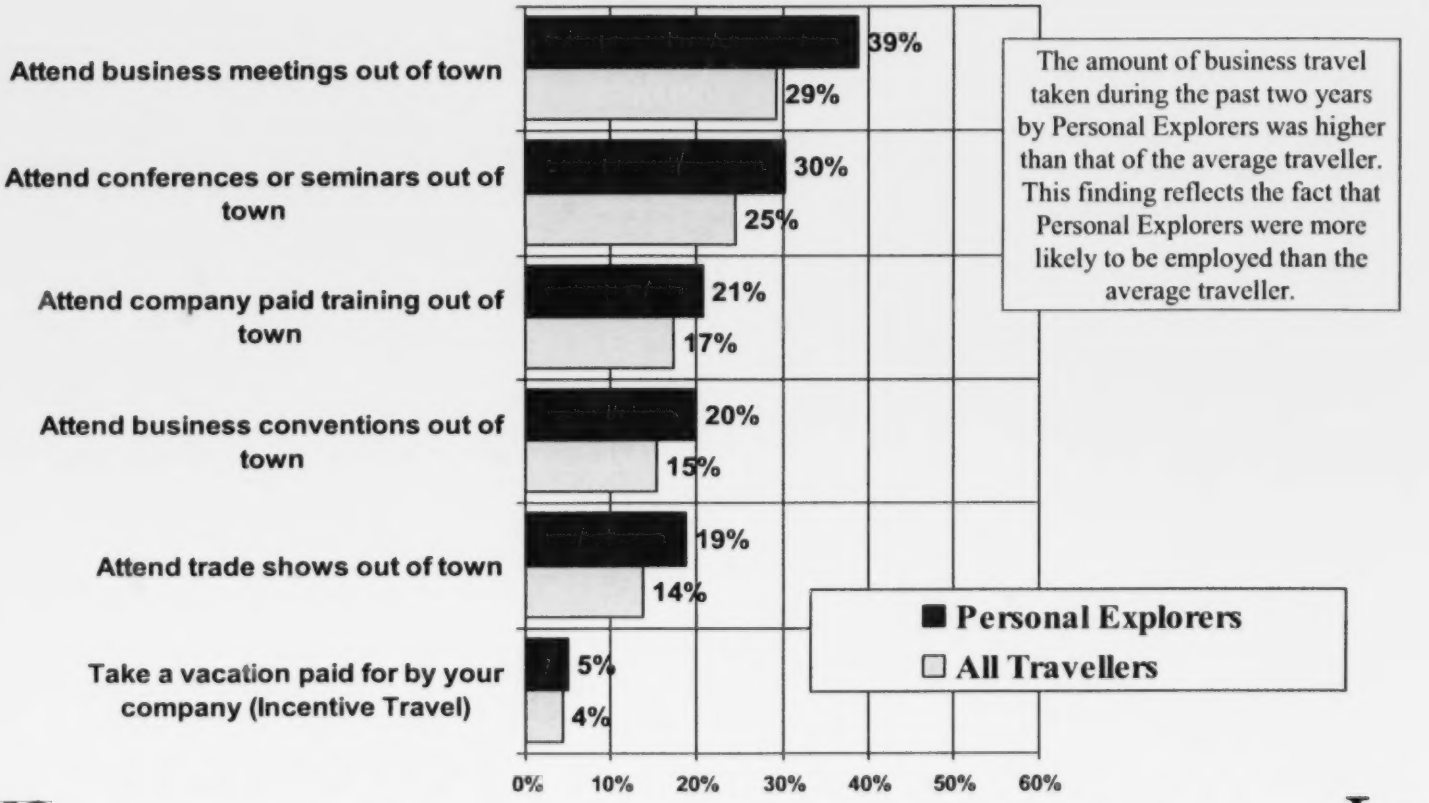
Technical Note

This analysis is based on a factor analysis of the same day and overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Percent Taking Various Types of Overnight Business Trip During Past Two Years

Personal Explorers

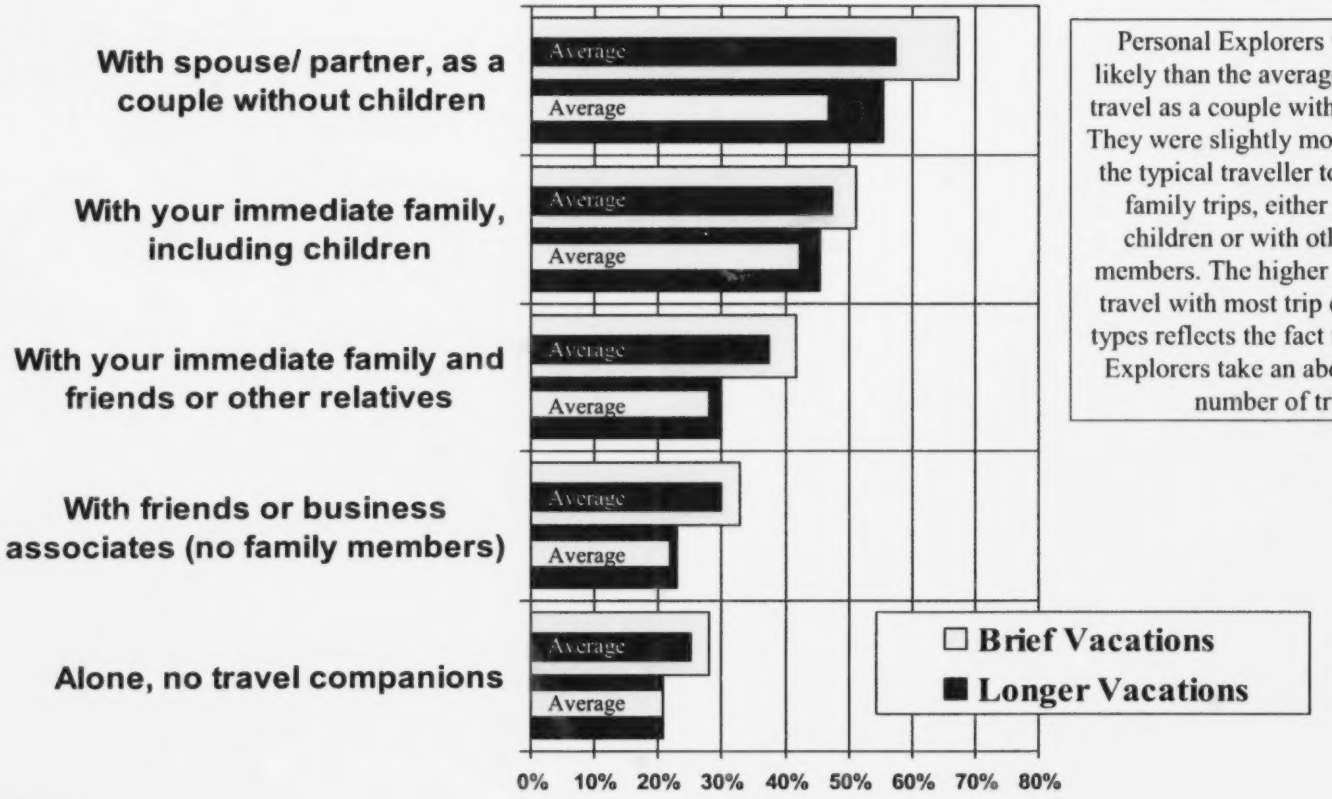
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Composition of Travel Party for Brief and Longer Trips During Past Two Years

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

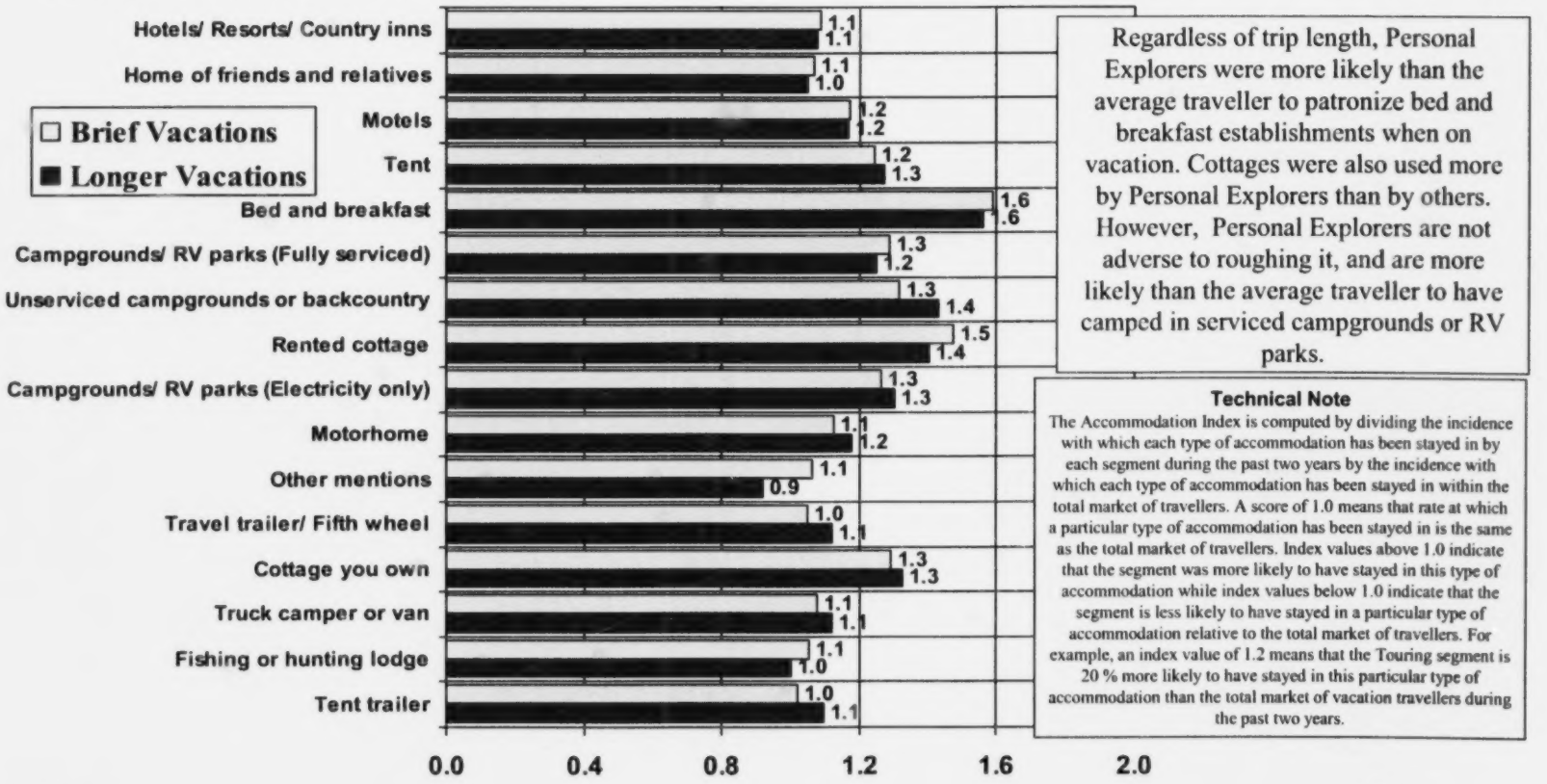


Personal Explorers were more likely than the average traveller to travel as a couple without children. They were slightly more likely than the typical traveller to have taken family trips, either with their children or with other family members. The higher incidence of travel with most trip composition types reflects the fact that Personal Explorers take an above average number of trips.

Types of Accommodations Used for Brief and Longer Trips During Past Two Years (Indexed)

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Regardless of trip length, Personal Explorers were more likely than the average traveller to patronize bed and breakfast establishments when on vacation. Cottages were also used more by Personal Explorers than by others. However, Personal Explorers are not adverse to roughing it, and are more likely than the average traveller to have camped in serviced campgrounds or RV parks.

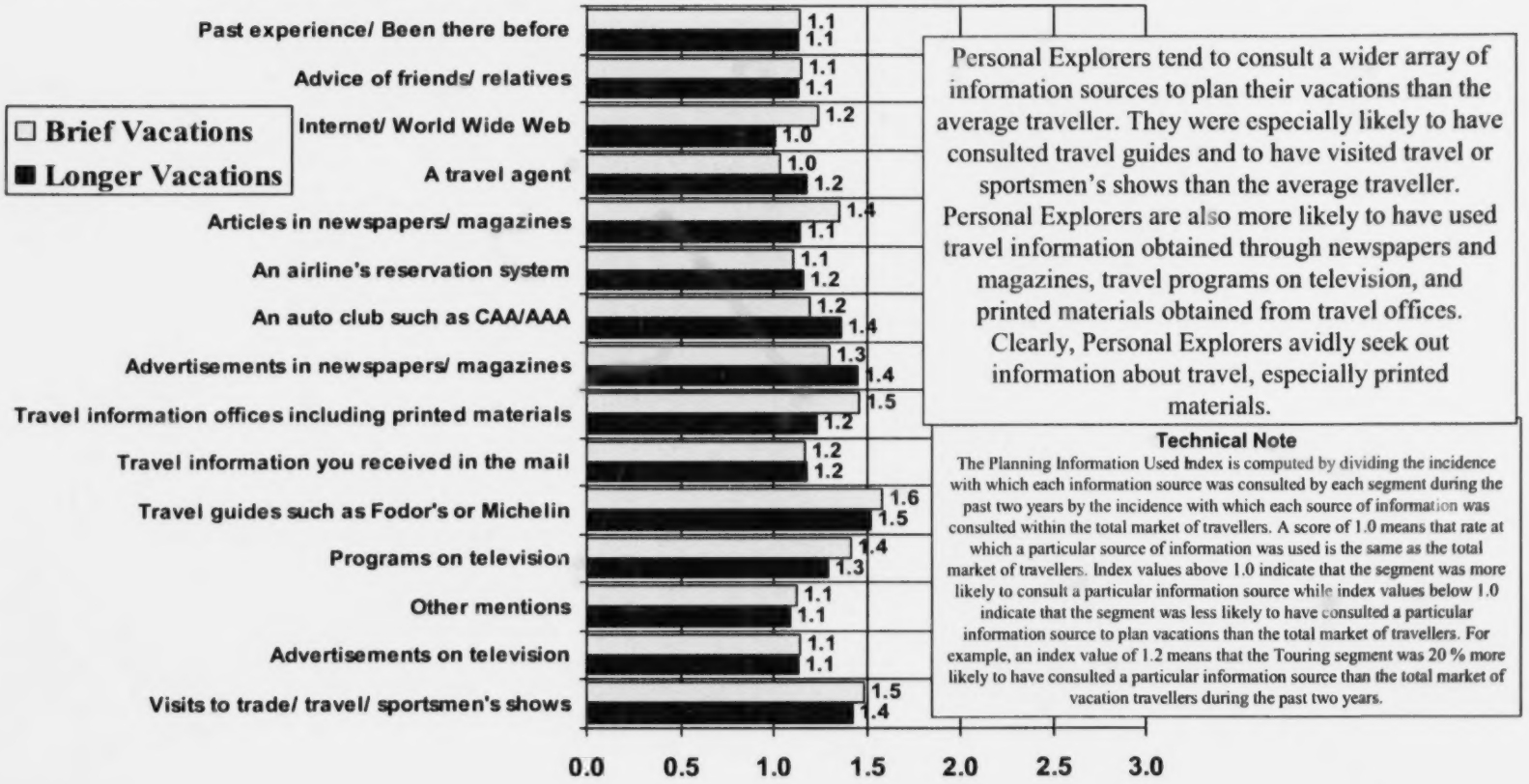
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to have stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of vacation travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past Two Years (Indexed)

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Personal Explorers tend to consult a wider array of information sources to plan their vacations than the average traveller. They were especially likely to have consulted travel guides and to have visited travel or sportsmen's shows than the average traveller. Personal Explorers are also more likely to have used travel information obtained through newspapers and magazines, travel programs on television, and printed materials obtained from travel offices. Clearly, Personal Explorers avidly seek out information about travel, especially printed materials.

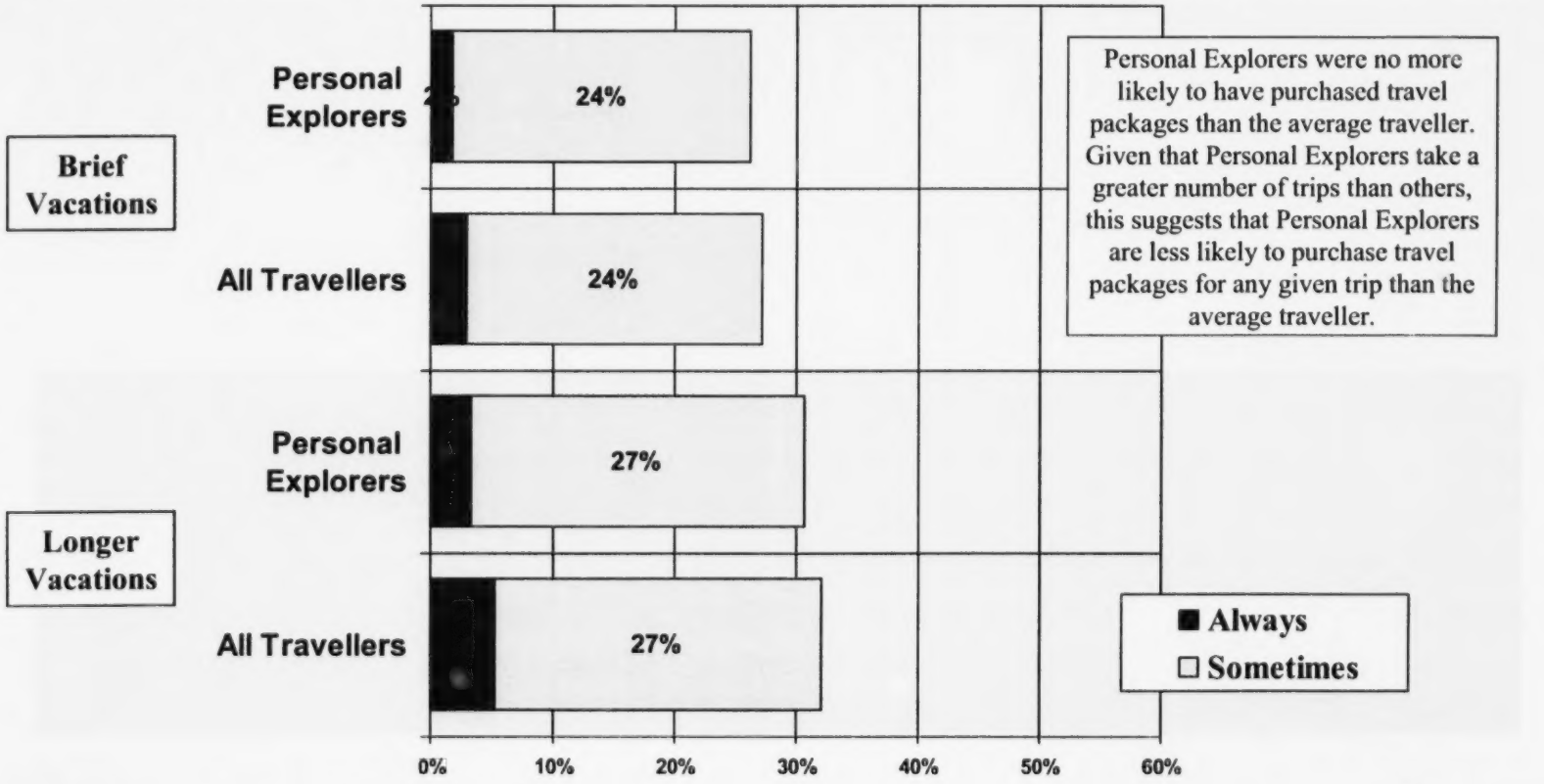
Technical Note

The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of travellers. For example, an index value of 1.2 means that the Touring segment was 20 % more likely to have consulted a particular information source than the total market of vacation travellers during the past two years.

How Often Travel Packages Used for Brief and Longer Vacations During Past Two Years

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

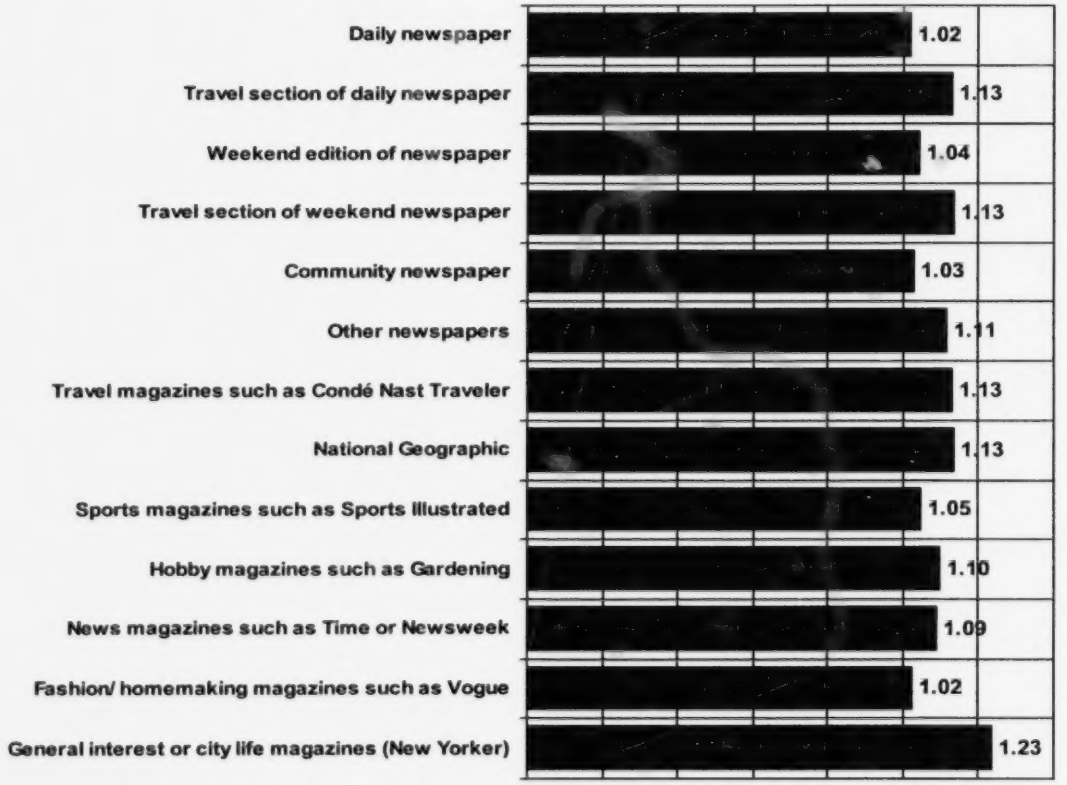


Media Index for Print Media: Canada & United States

Personal Explorers

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Travellers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that Personal Explorers were above average readers of travel-related print material, including travel magazines and the travel section of their daily newspapers. Print media will be an effective way to communicate with this segment.

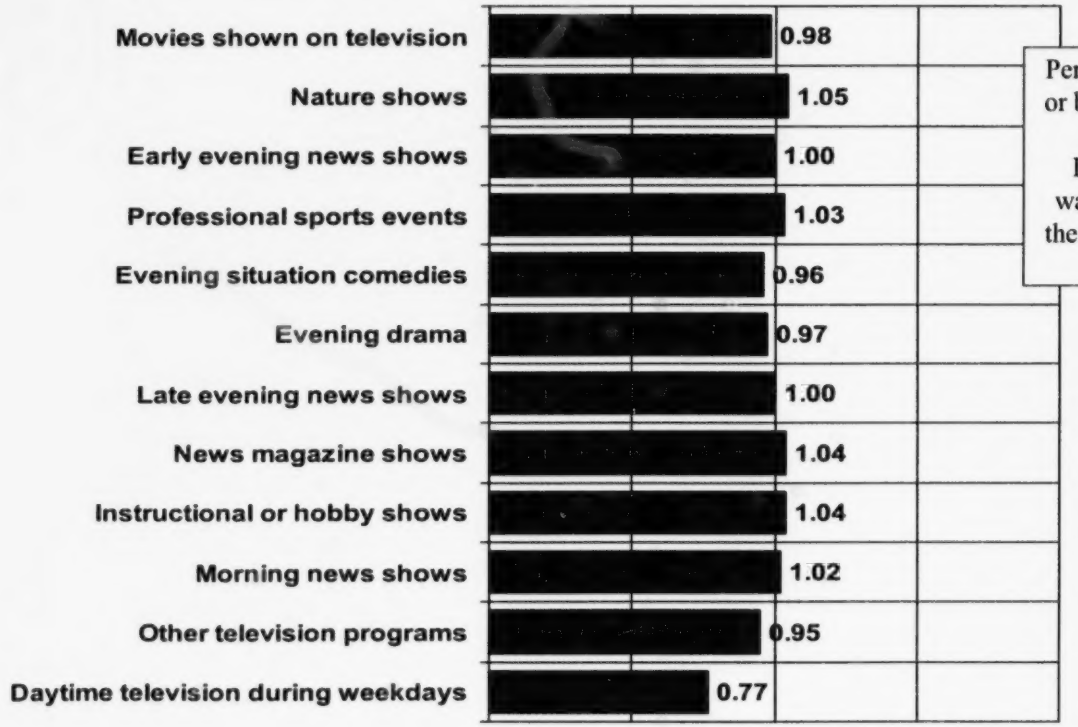
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that Personal Explorers were 20 % more likely to read a particular publication than the total market of vacation travellers.

Media Index for Television Programming: Canada & United States

Personal Explorers

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Travellers
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Personal Explorers typically were average or below average viewers of most types of television programming. Personal Explorers were especially unlikely to watch daytime television, which reflects the fact that most Personal Explorers have full-time jobs.

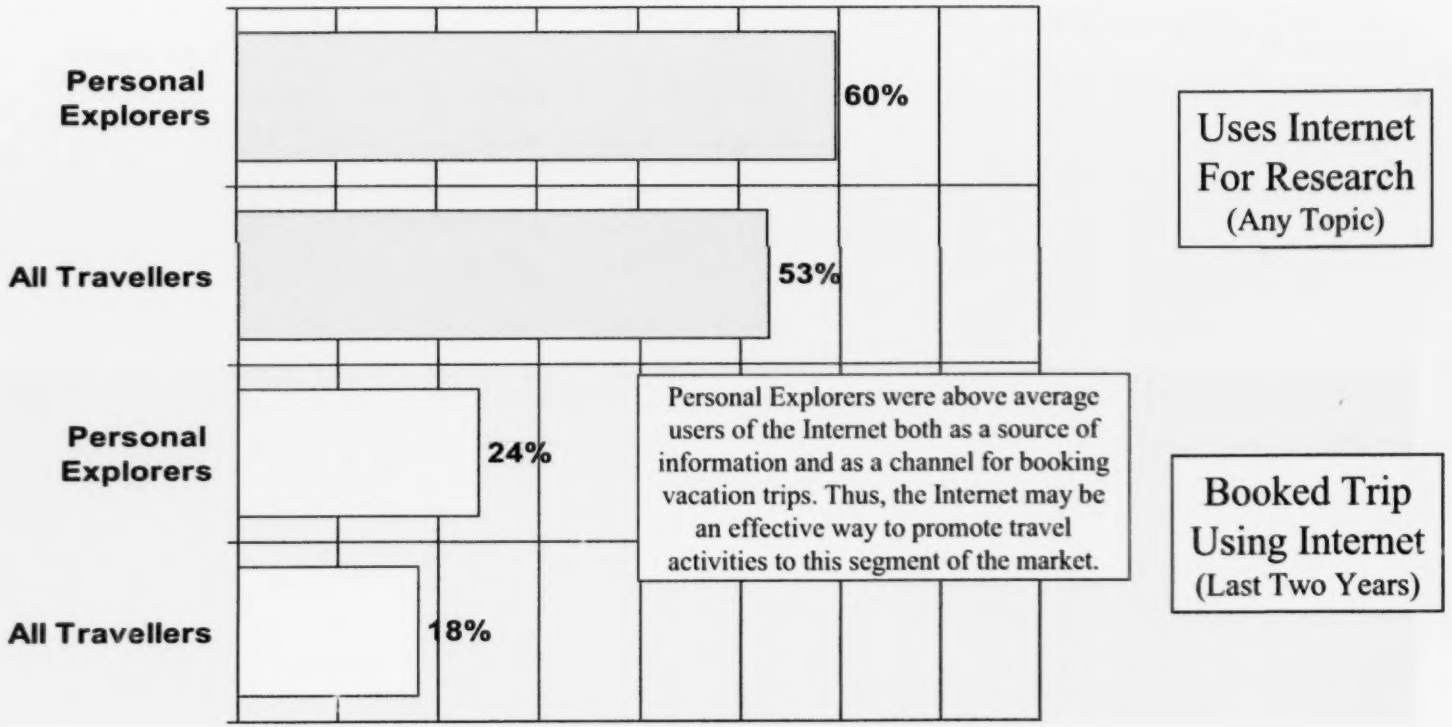
Technical Note

The Media Index is computed by dividing the percent within each segment routinely watching each program by the percent in the total market who routinely watches each program. A score of 1.0 means that viewership is the same as the total market. Index values above 1.0 indicate that the viewership is above average while index values below 1.0 indicate that viewership is below average. For example, an index value of 1.2 means that Personal Explorers were 20 % more likely to watch a particular program than the total market of vacation travellers.

Percent Using Internet and Booking At Least One Trip Using the Internet

Personal Explorers

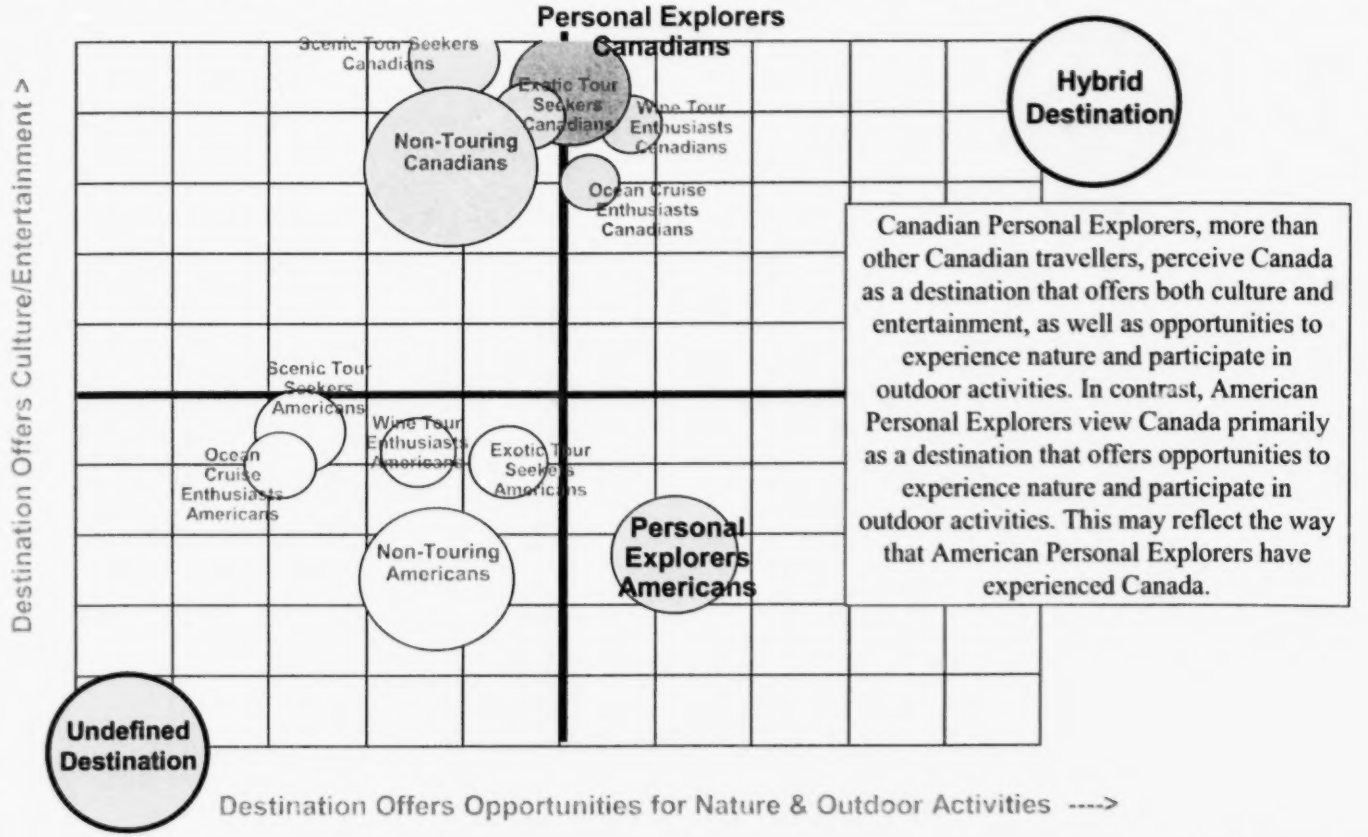
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Vacation Imagery of Canada

Personal Explorers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment

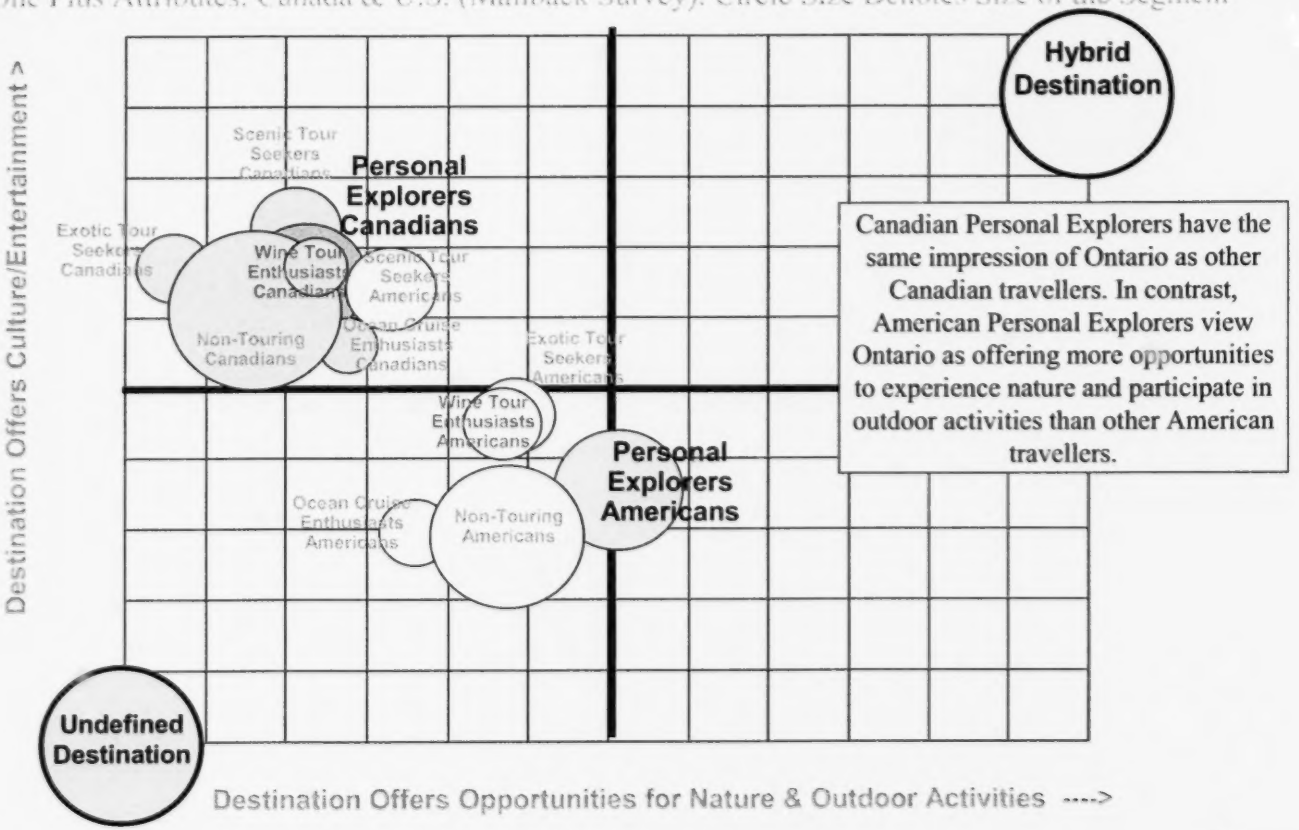


Canadian Personal Explorers, more than other Canadian travellers, perceive Canada as a destination that offers both culture and entertainment, as well as opportunities to experience nature and participate in outdoor activities. In contrast, American Personal Explorers view Canada primarily as a destination that offers opportunities to experience nature and participate in outdoor activities. This may reflect the way that American Personal Explorers have experienced Canada.

Vacation Imagery of Ontario

Personal Explorers

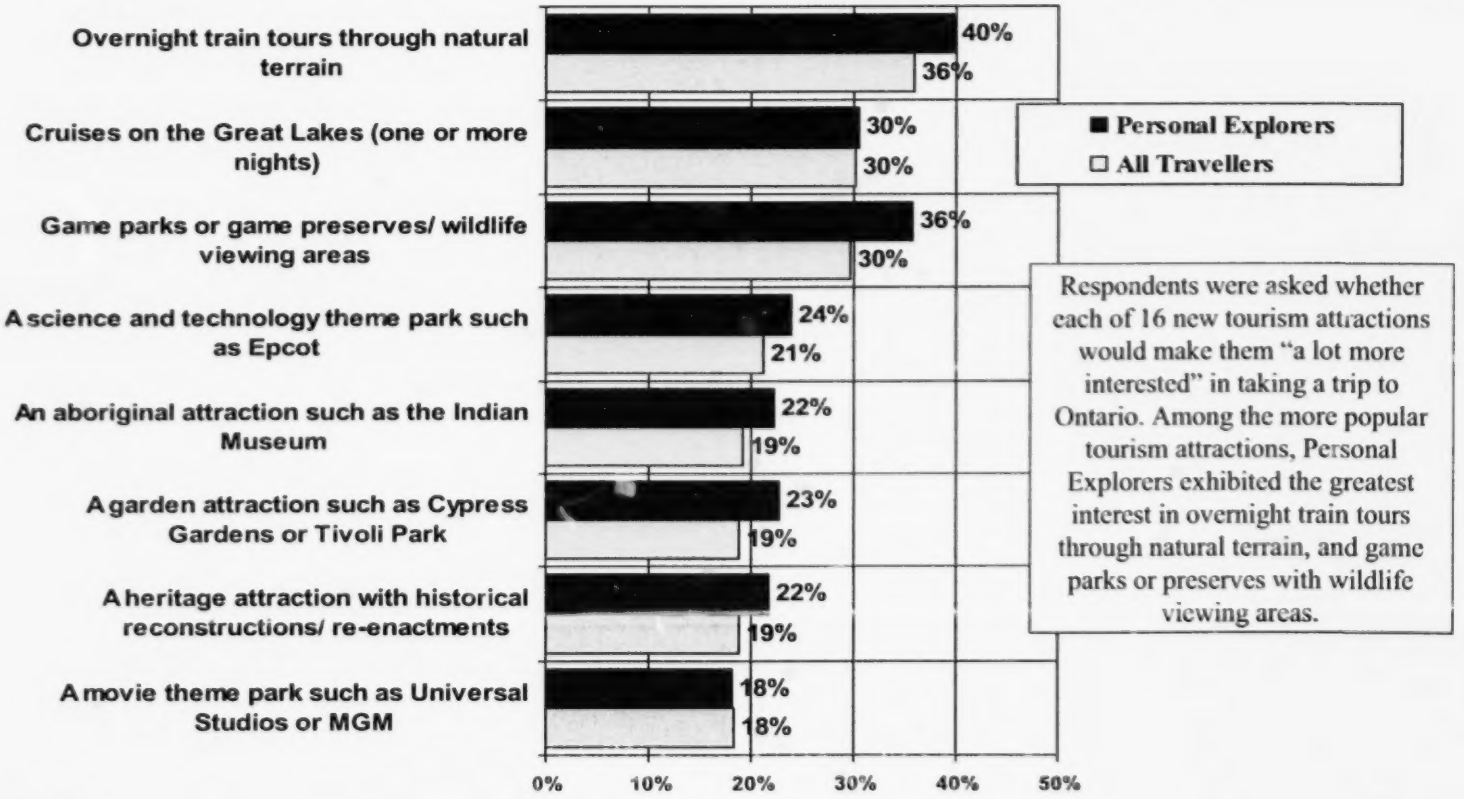
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



Interest in New Tourism Products

Personal Explorers (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

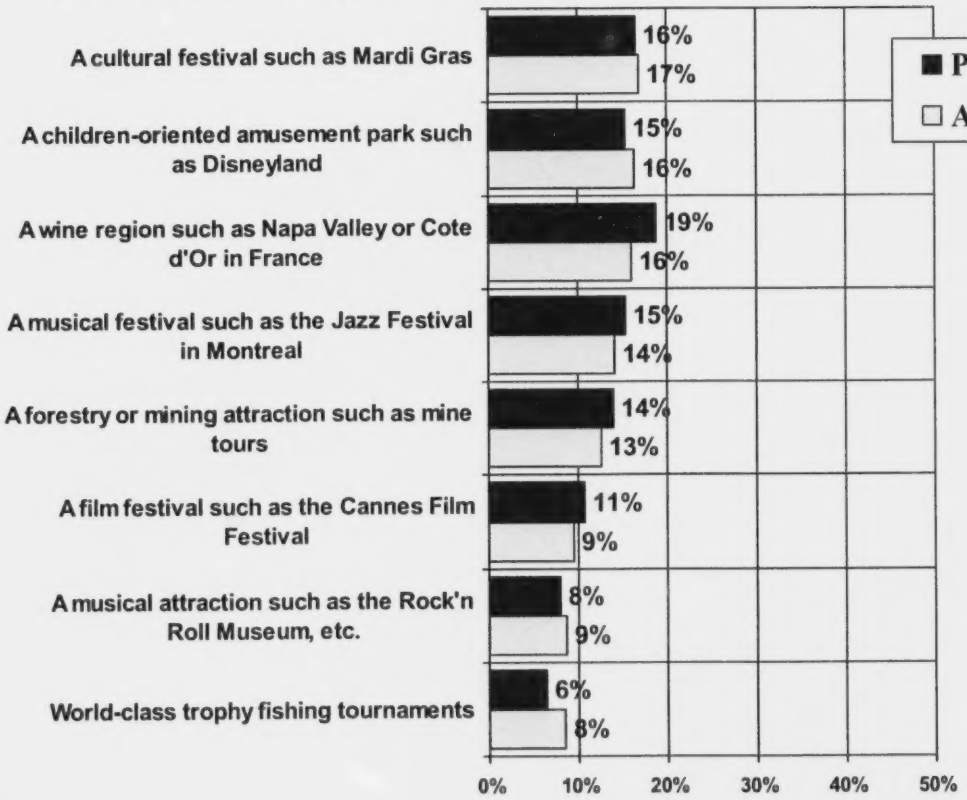


Respondents were asked whether each of 16 new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, Personal Explorers exhibited the greatest interest in overnight train tours through natural terrain, and game parks or preserves with wildlife viewing areas.

Interest in New Tourism Products

Personal Explorers (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Personal Explorers were also slightly more interested than the average traveller in visiting a wine region in Ontario.

Section Six

Exotic Tour Seekers

Detailed Segment Profile

Exotic Tour Seekers

Exotic Tour Seekers represent 8.9 % of Canadian travellers and 9.4 % of American travellers. They are typical of touring travellers in terms of their age (average age is 45.8 years), but they report above average education levels and household incomes. Affluent Families, Mainstream Mature Couples and Mainstream Mature Singles were slightly over-represented within this segment, although Exotic Tour Seekers are less distinctive from a demographic perspective than other touring segments.

Exotic Tour Seekers find "the exotic" both domestically and overseas. They were more likely than others to visit countries beyond North America and the Caribbean (20% versus 14%), but were also more likely to travel domestically than the average traveller. Moreover, both Canadian and American Exotic Tour Seekers (86% and 47%, respectively) were more likely than the average traveller to have plans to travel in Canada over the next two years. In the past two years, Canadian Exotic Tour Seekers were much more likely than the average traveller to have visited Quebec, while their American counterparts were much more likely to have visited British Columbia.

Exotic Tour Seekers were more likely than others to seek out exploratory vacation experiences. They exhibit particular interest in natural sightseeing and visiting natural phenomena. They also were more likely than the average traveller to have participated in vigorous physical activity outdoors when on vacation, including fitness activities, canoeing, kayaking, hiking, sailing, windsurfing and scuba diving. Exotic Tour Seekers also displayed a marked interest in visiting gardens and natural attractions as well as zoos, aquariums and planetariums, a reflection of their interest in opportunities to explore the natural world. They were much more likely than any other travellers to have taken scenic day trips by boat, train and air. Their desire to get back to nature was also reflected in their choice of accommodations, which includes stays at lodges or cottages.

Exotic Tour Seekers used a wider array of travel information sources to plan their vacations than the typical traveller. Travel and sportsmen's shows, television programs, travel information received in the mail, and printed materials from travel information offices were especially likely to be used by Exotic Tour Seekers to plan their vacations.

Travel packages oriented towards unique natural areas will likely appeal to most Exotic Tour Seekers. They were more likely than other travellers to purchase travel packages for both brief and longer vacation trips. In fact, 44 % of Exotic Tour Seekers have purchased travel packages for at least some of their longer vacations within the last two years.

Exotic Tour Seekers

Key Demographic Characteristics

Exotic Tour Seekers represent 8.9 % of Canadian vacation travellers and 9.4 % of American travellers. Senior and Mature Couples tend to be over-represented among the Exotic Tour Seekers, although Young Families represent 26.7 % of this segment. They report average household incomes and education levels.

Percent of Total Population:	7.8 % [Canada]; 8.3 % [United States]
Percent of Travellers:	8.9 % [Canada]; 9.4 % [United States]
Number of Individuals in Segment:	1,535,322 [Canada]; 14,216,152 [United States]
Average Age/Dominant Age Range:	45.8 years old; 26 to 55 (62.1 %)
Dominant Life Cycle Stages:	Senior Couples [Index=116; 7.6 %]
	Mature Couples [Index=109; 21.5 %]
	Young Families [Index=98; 26.7 %]
Household Income:	$56,800; 20.8 % HHI of $80K or more
Percent with Post-Secondary Education:	53.2 % University/College; 65.0 % Advanced Degrees
Dominant Occupation Status:	57.3% Employed; 18.8 % Retired; 8.8 % Self-employed

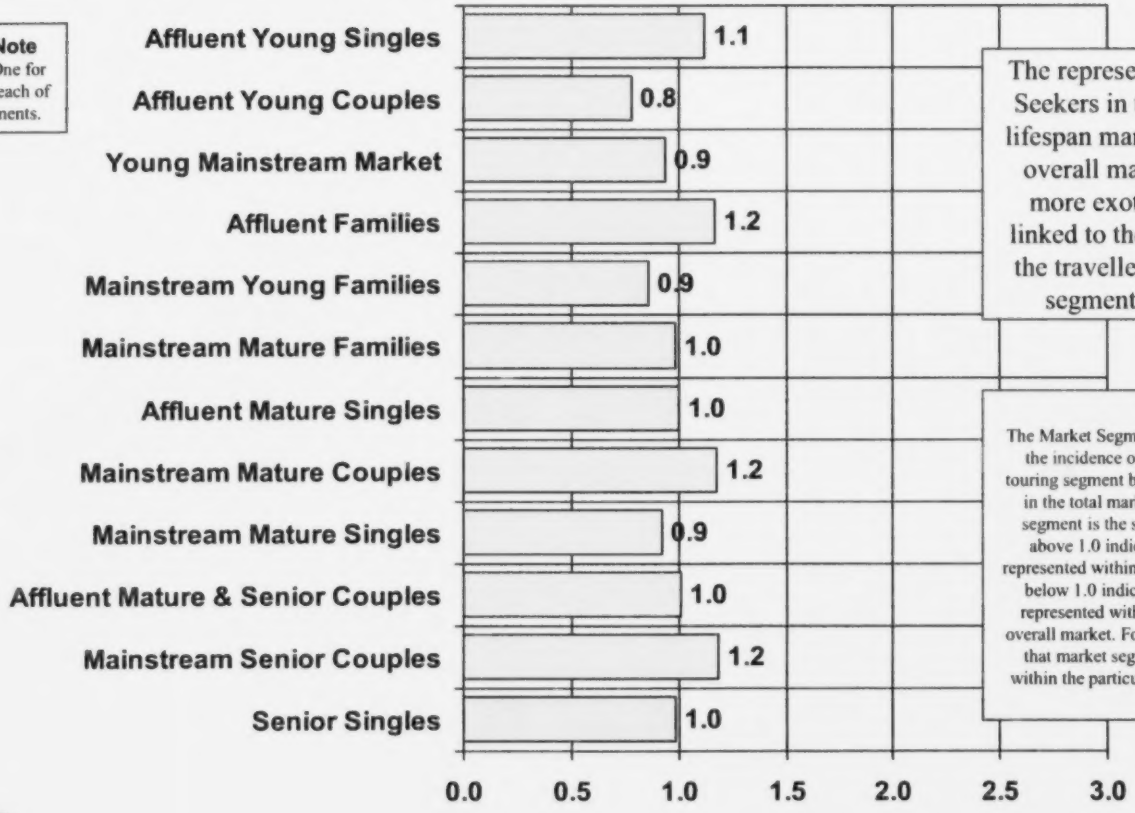
Technical Note
See Appendix One for a description of each of the life cycle stages.

Touring Segmentation: Market Segment Indexing

Exotic Tour Seekers

Distribution of Market Segments within Exotic Tour Seekers Segment Divided By Distribution of Market Segments in Total Population
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



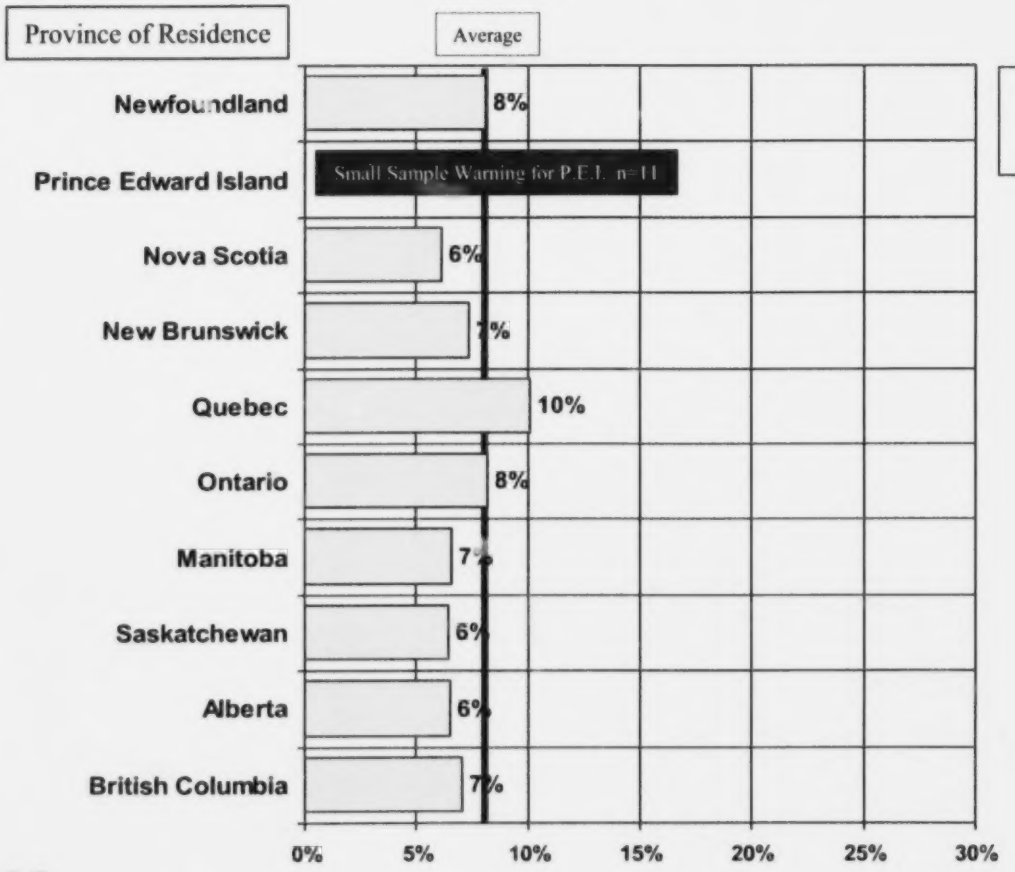
The representation of the Exotic Tour Seekers in terms of the demographic lifespan market segments parallels the overall market. As such, interest in more exotic tours does not appear linked to the demographic lifespan of the traveller. This is the only touring segment to exhibit this pattern.

Technical Note
The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular touring segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the touring segment while index values below 1.0 indicate that the market segment is under-represented within the touring segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to be found within the particular touring segment than in the general population.

Touring Segment Incidence in Canada

Exotic Tour Seekers: By Province

Base: Adult (18 Plus) Canadian Population Who Took a Trip or Plans to Take a Trip in Past Next Two Years

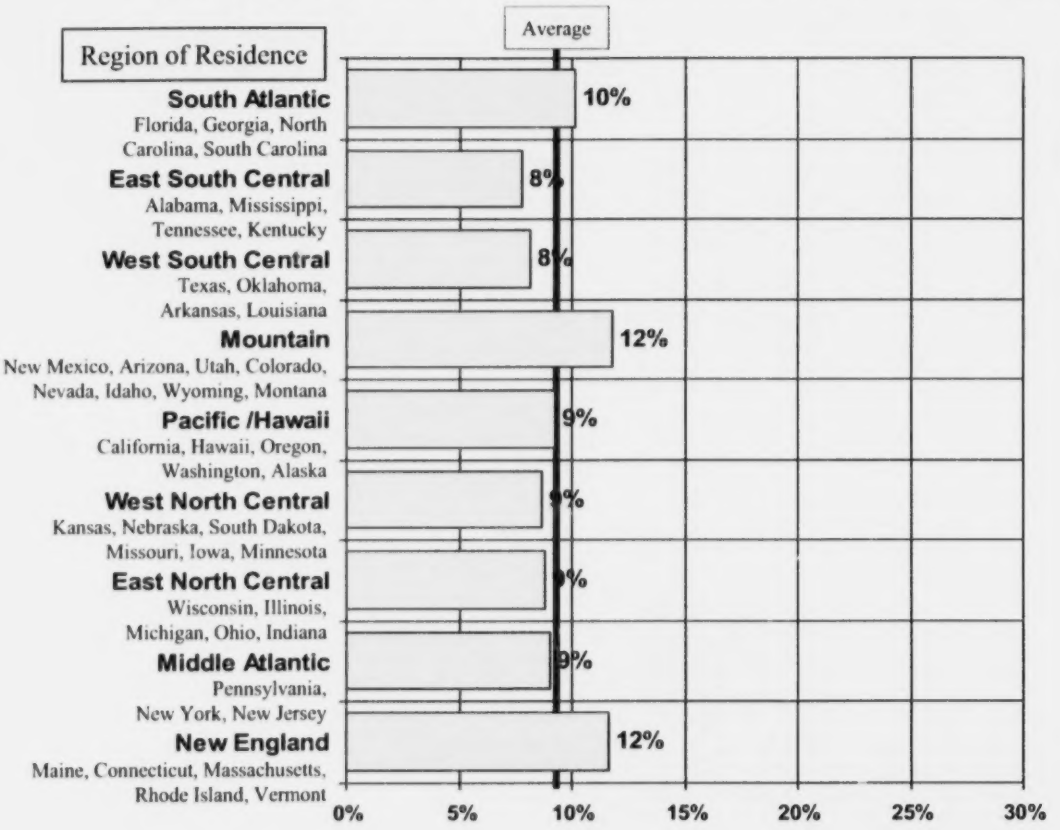


Among Canadians, there was little variation in the incidence of Exotic Tour Seekers across the provinces.

Touring Segment Incidence in United States

Exotic Tour Seekers: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took a Trip or Plans to Take a Trip in Past Next Two Years

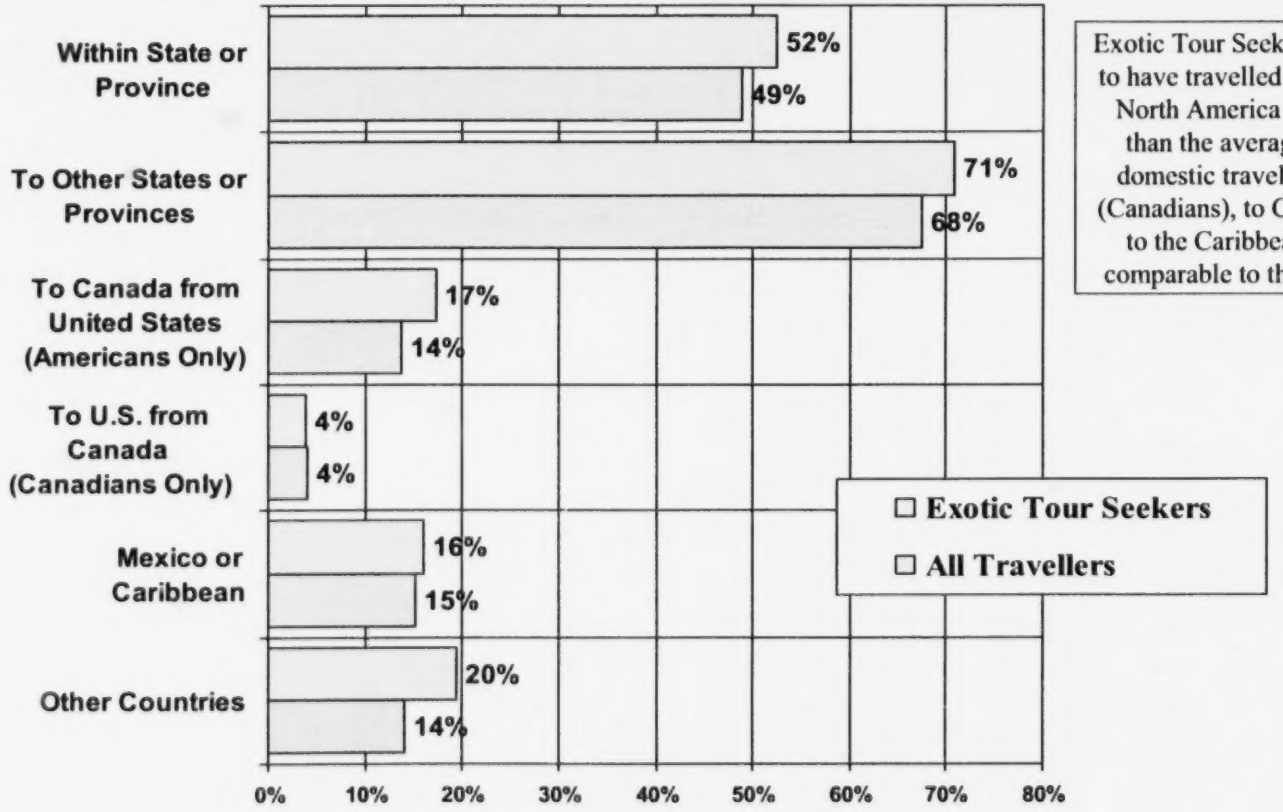


The incidence of Exotic Tour Seekers was relatively uniform across the nine regions of the United States. However, Exotic Tour Seekers were slightly more likely to be found in the Mountain region and the New England region of the U.S.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Exotic Tour Seekers

Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years

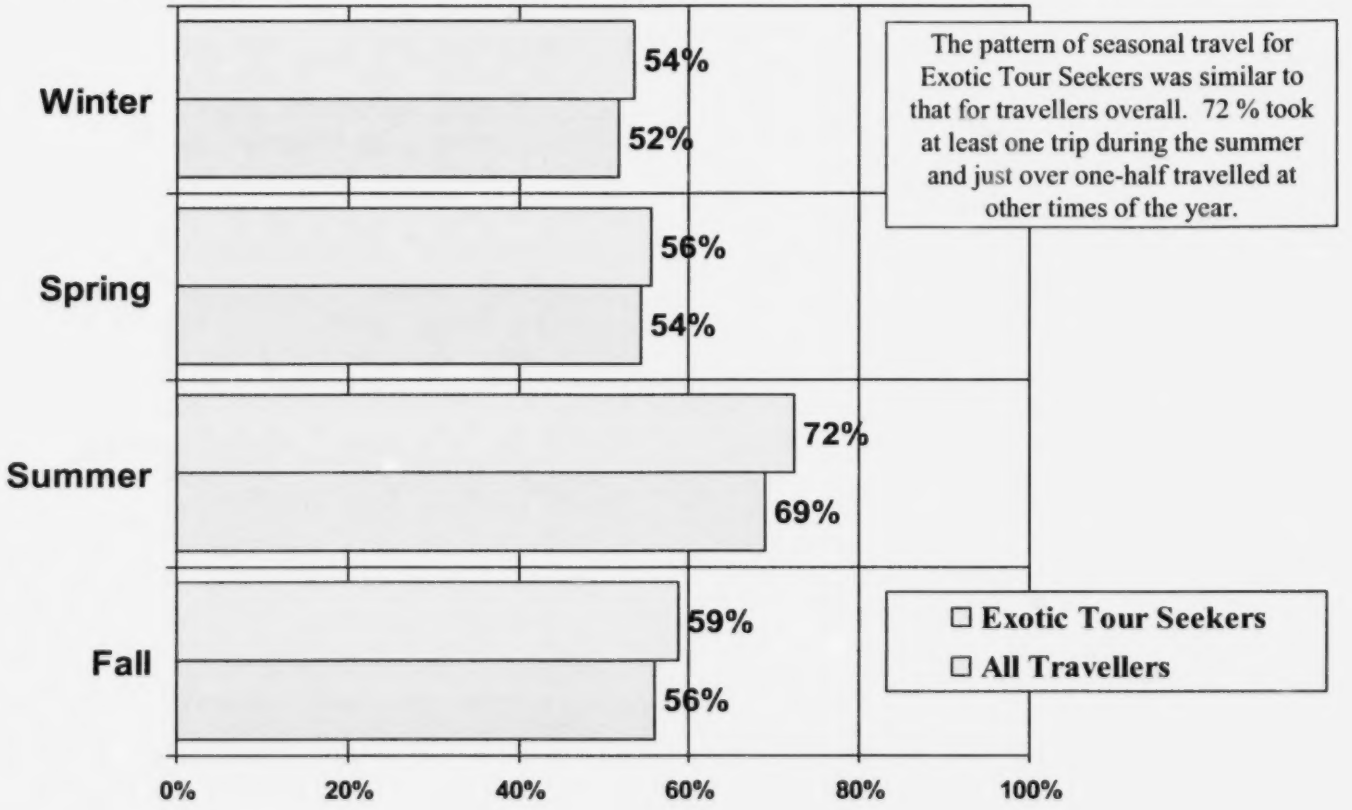


Exotic Tour Seekers were more likely to have travelled to countries beyond North America and the Caribbean than the average traveller. Their domestic travel, travel to the U.S. (Canadians), to Canada (Americans), to the Caribbean and Mexico, is comparable to the average traveller.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past Two Years

Exotic Tour Seekers: Percent Taking Trip Each Season

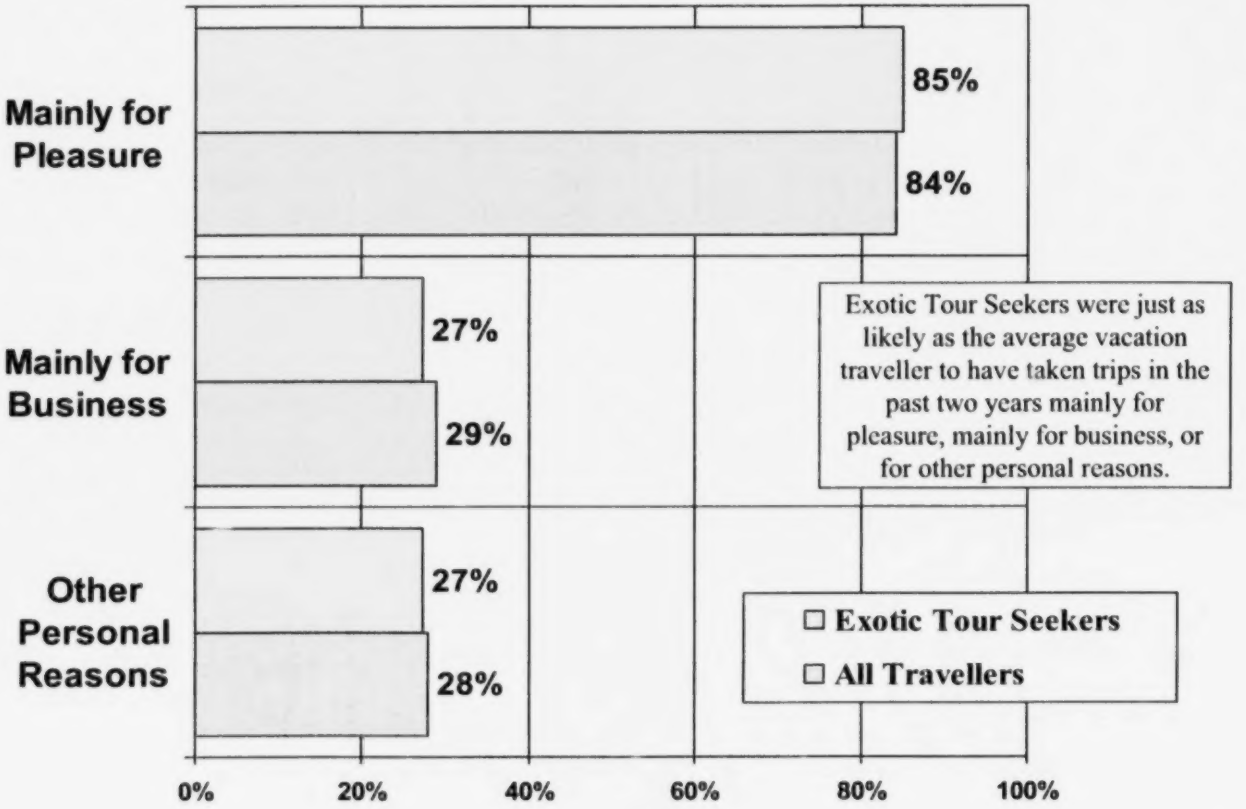
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years



Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past Two Years

Exotic Tour Seekers: Percent Taking Trip for Various Reasons

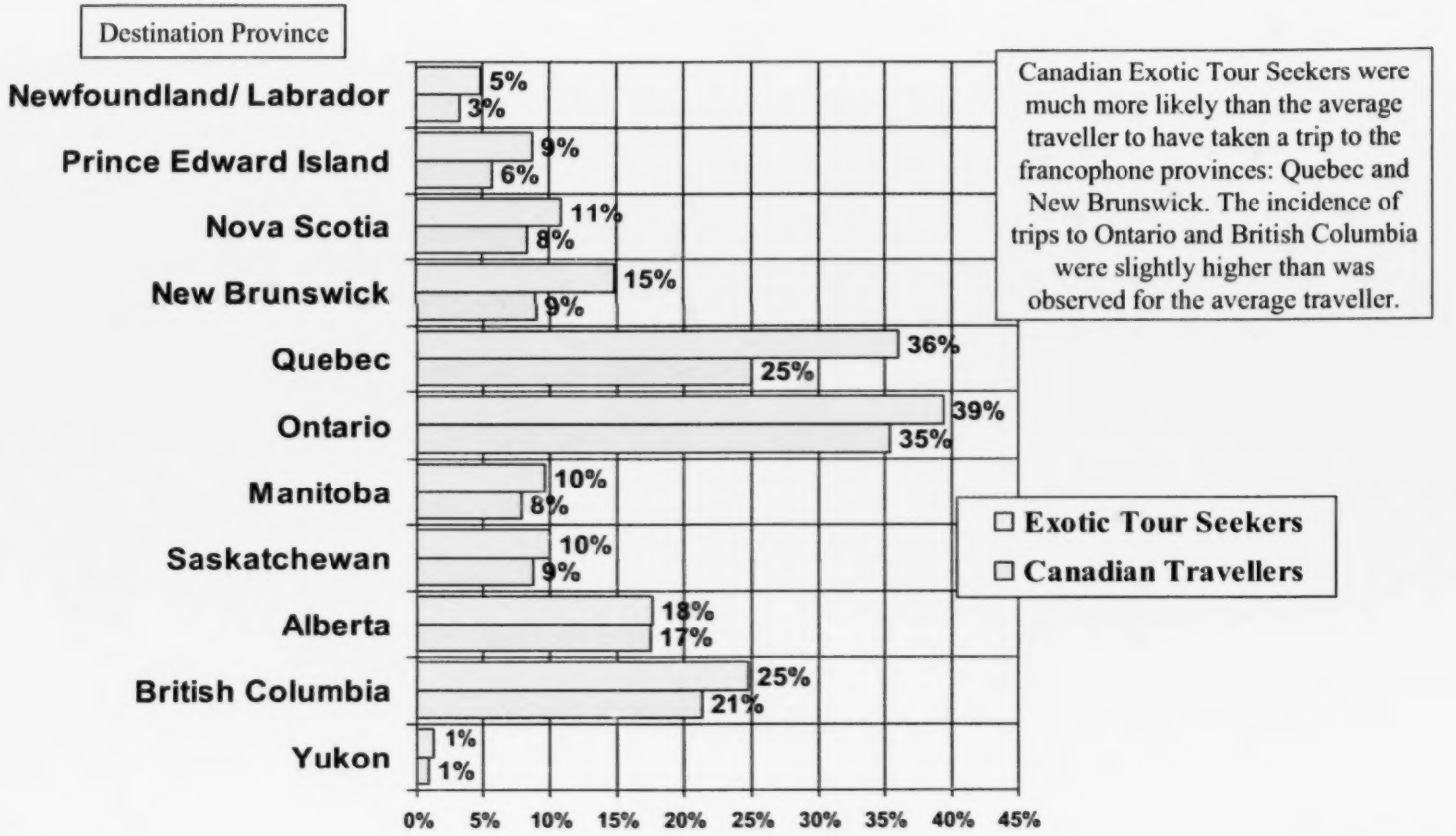
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past Two Years

Exotic Tour Seekers: Percent of Canadians Taking a Trip to Various Provinces

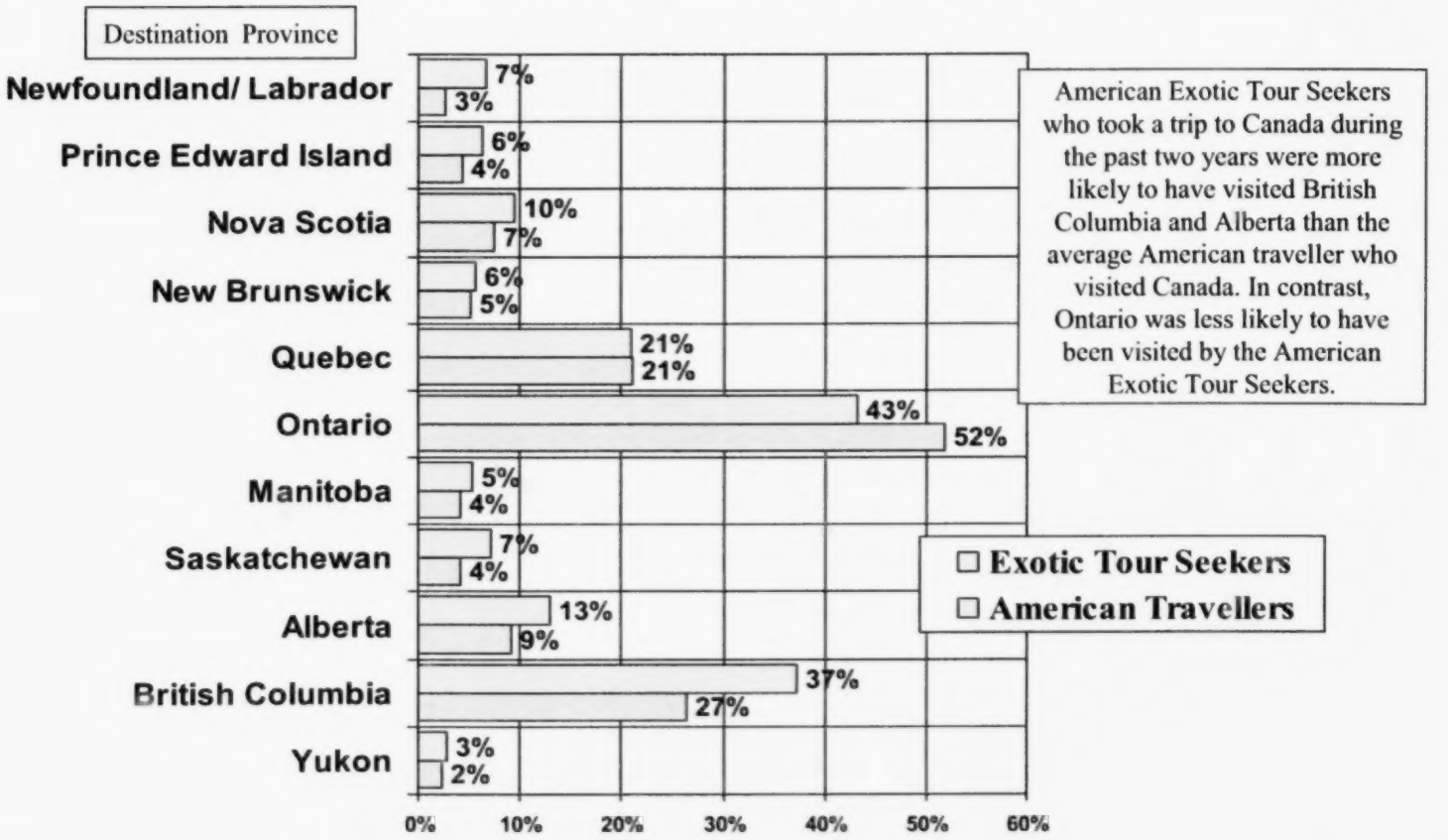
Base: Adult (18 Plus) Canadian Population Who Took a Vacation Trip and Trip Within Canada in the Past Two Years



Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past Two Years

Exotic Tour Seekers: Percent of Americans Taking a Trip to Various Provinces

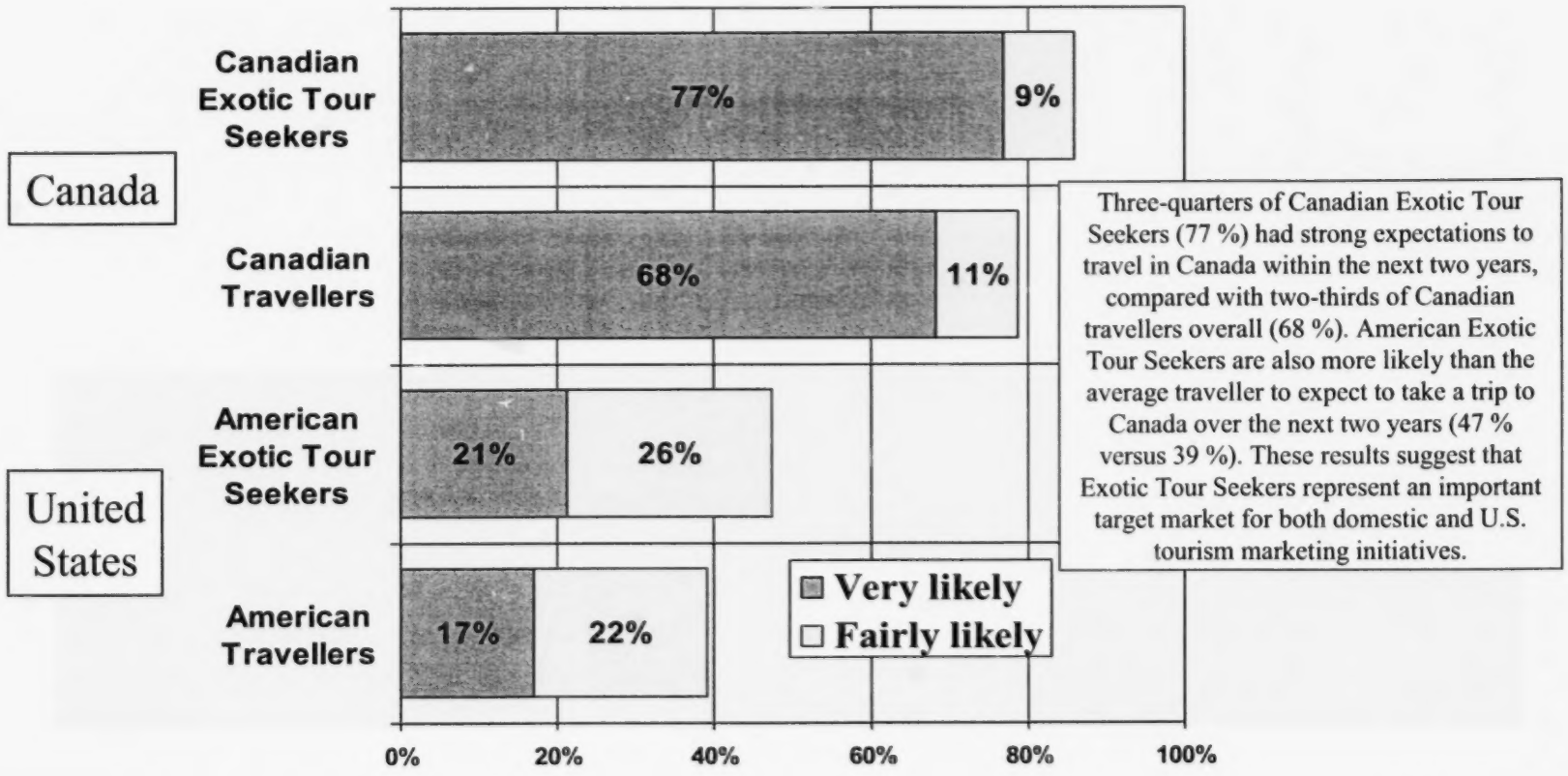
Base: Adult (18 Plus) U.S. Population Who Took a Vacation Trip and a Trip to Canada in the Past Two Years



Touring Segmentation

Exotic Tour Seekers: Intentions to Travel Within/To Canada Next Two Years

Base: Adult Population (18 Plus) Who Took a Vacation Trip in Last Two Years

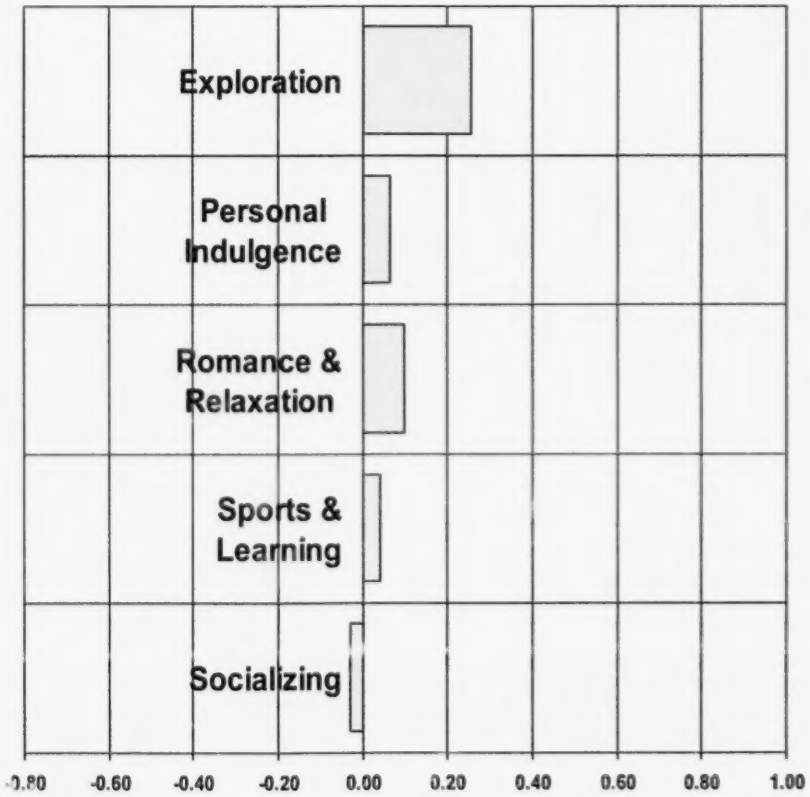


Three-quarters of Canadian Exotic Tour Seekers (77 %) had strong expectations to travel in Canada within the next two years, compared with two-thirds of Canadian travellers overall (68 %). American Exotic Tour Seekers are also more likely than the average traveller to expect to take a trip to Canada over the next two years (47 % versus 39 %). These results suggest that Exotic Tour Seekers represent an important target market for both domestic and U.S. tourism marketing initiatives.

General Vacation Experiences Sought During Pleasure Travel in the Past Two Years

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Exotic Tour Seekers were more likely to seek out exploratory vacation experiences than the average vacation traveller. Beyond this, the vacation experiences sought by the Exotic Tour Seekers were comparable to those of the average traveller.

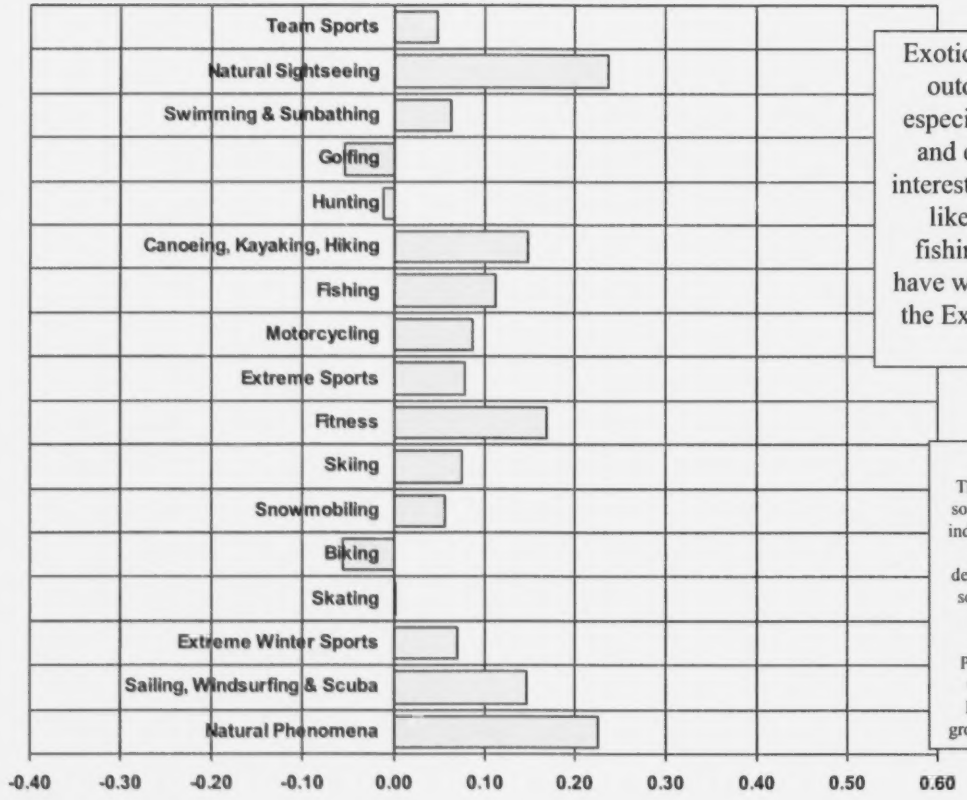
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past Two Years

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Exotic Tour Seekers were very active in a variety of outdoor activities while on vacation. They were especially likely to participate in natural sightseeing and exploring natural phenomena, reflecting their interest in nature. Exotic Tour Seekers were also more likely to have gone canoeing, kayaking, hiking, fishing, sailing, windsurfing or scuba diving, or to have worked out in a fitness centre. This suggests that the Exotic Tour Seekers are quite energetic while on vacation.

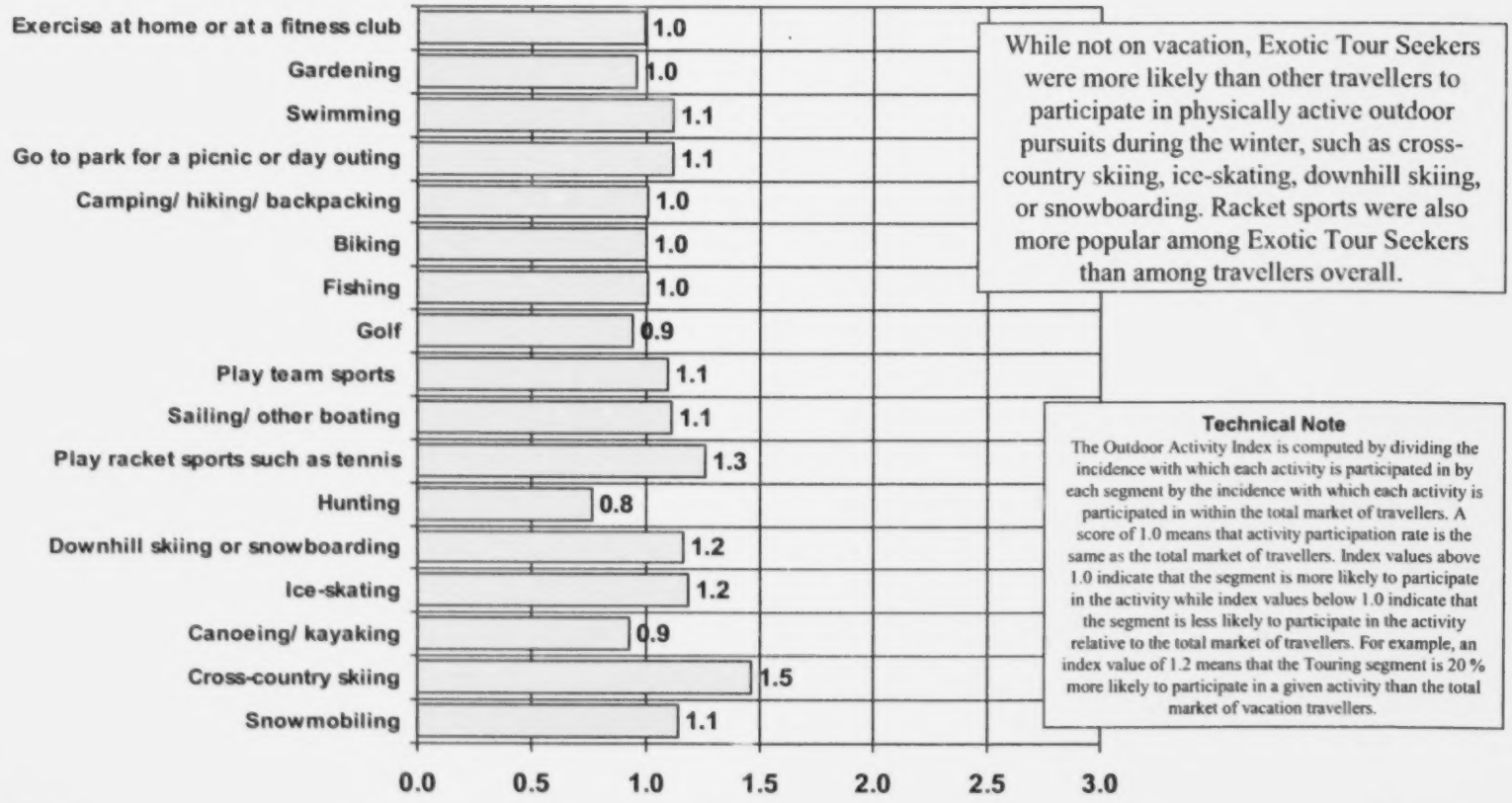
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Exotic Tour Seekers were more likely than other travellers to participate in physically active outdoor pursuits during the winter, such as cross-country skiing, ice-skating, downhill skiing, or snowboarding. Racket sports were also more popular among Exotic Tour Seekers than among travellers overall.

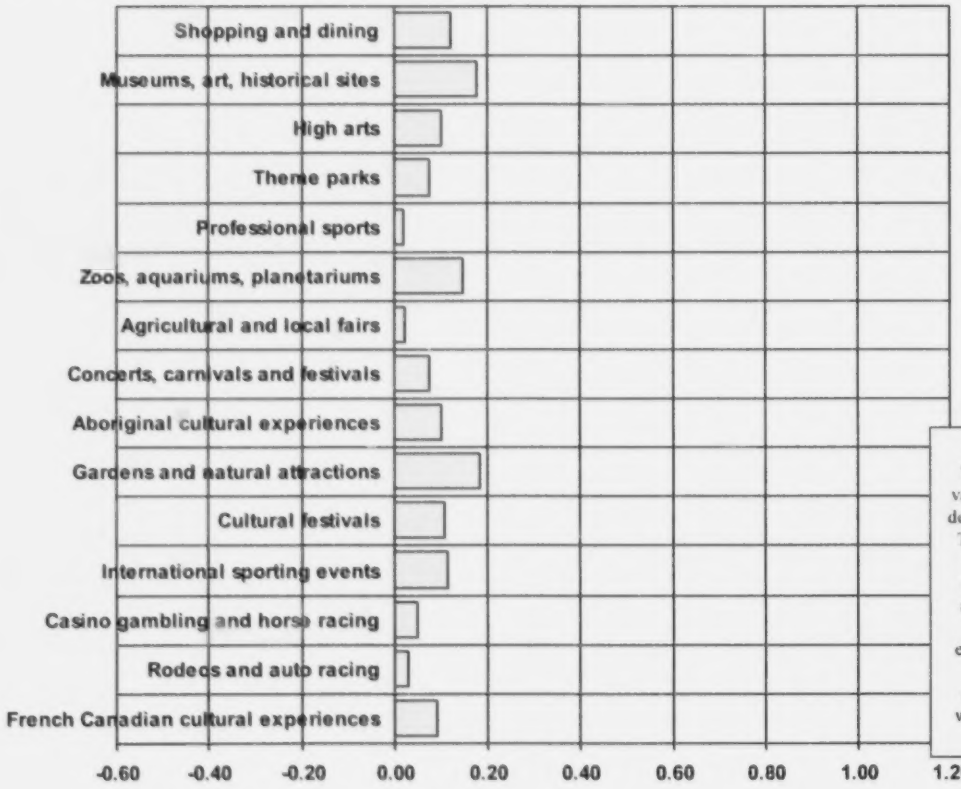
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to participate in a given activity than the total market of vacation travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past Two Years

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



In contrast to their vigorous participation in outdoor activities, Exotic Tour Seekers generally were no more active in most cultural and entertainment pursuits than the typical traveller. However, Exotic Tour Seekers were slightly more likely to visit museums, art and historical sites, and gardens and natural attractions than the average traveller.

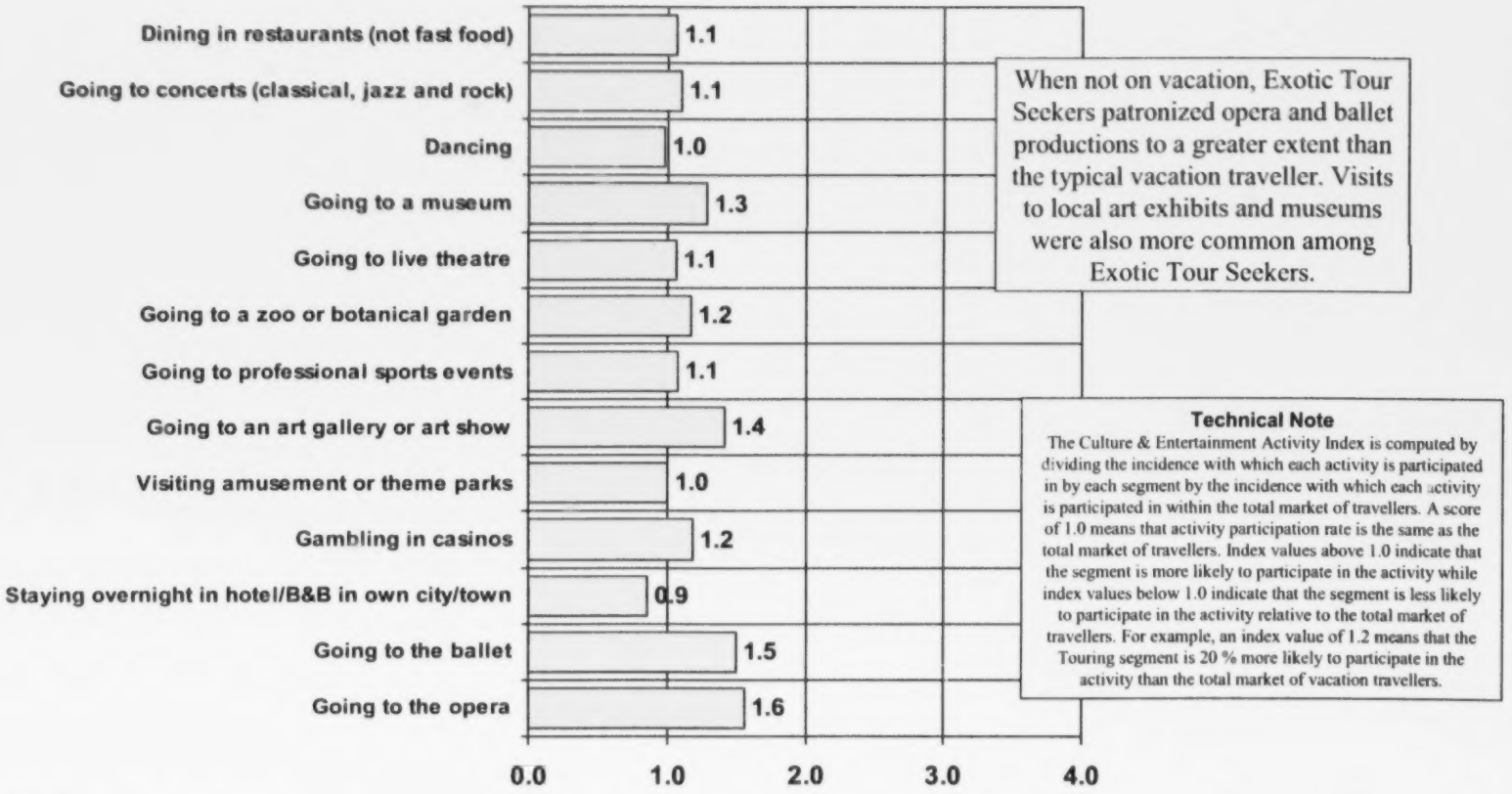
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



When not on vacation, Exotic Tour Seekers patronized opera and ballet productions to a greater extent than the typical vacation traveller. Visits to local art exhibits and museums were also more common among Exotic Tour Seekers.

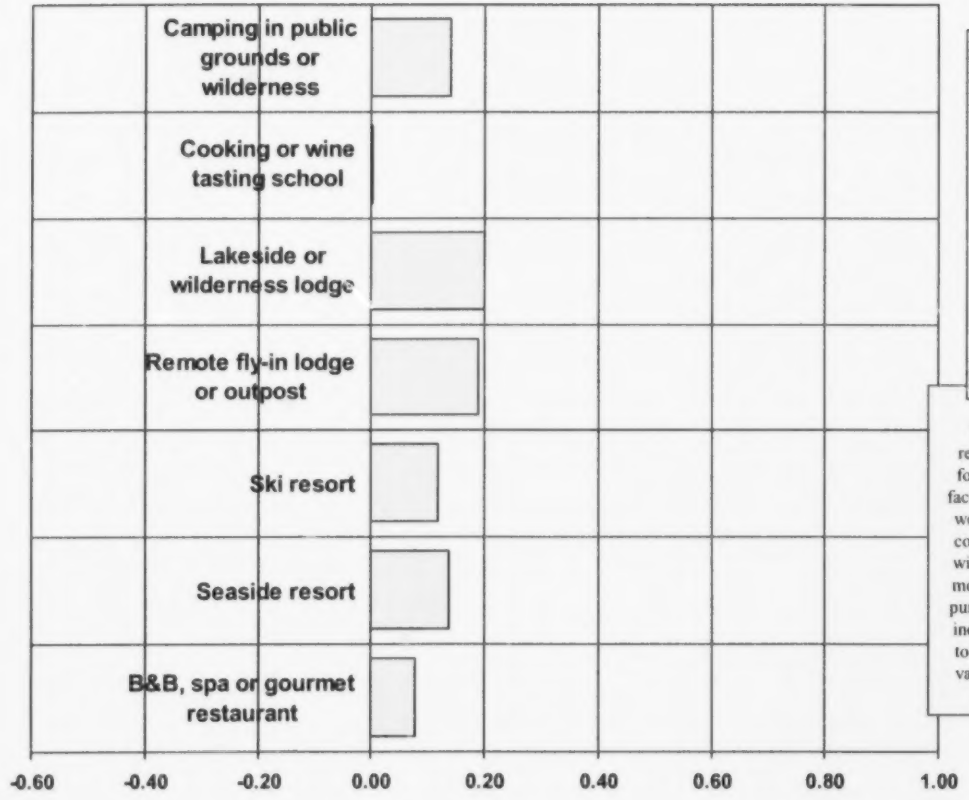
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to participate in the activity than the total market of vacation travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past Two Years

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Exotic Tour Seekers were more likely than others to enjoy both backwoods accommodations (lakeside or wilderness lodge, a remote fly-in lodge or outpost, camping in public grounds or wilderness) and luxurious accommodations (ski resort, seaside resort, and B&B, spa or gourmet restaurant) during the past two years. Exotic Tour Seekers exhibit a wide variety of interests in activity-related accommodations.

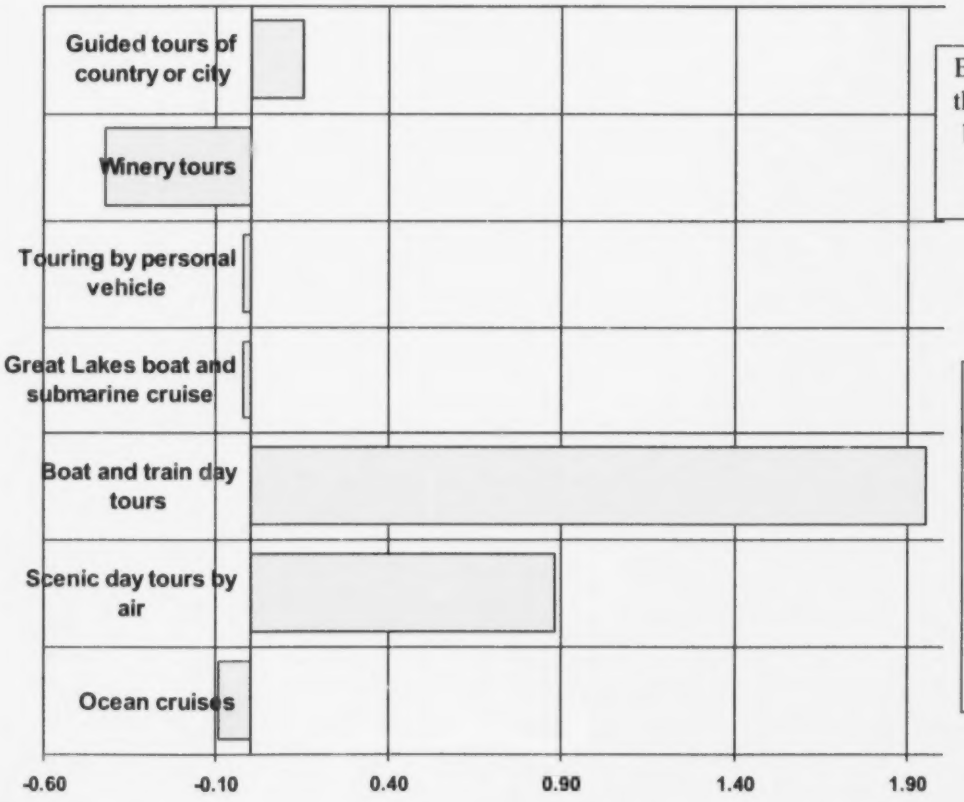
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past Two Years

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Exotic Tour Seekers were much more likely than others to have taken scenic day trips by boat, train or air during the past two years. On the other hand, they were unlikely to have taken a wine tour while on a trip.

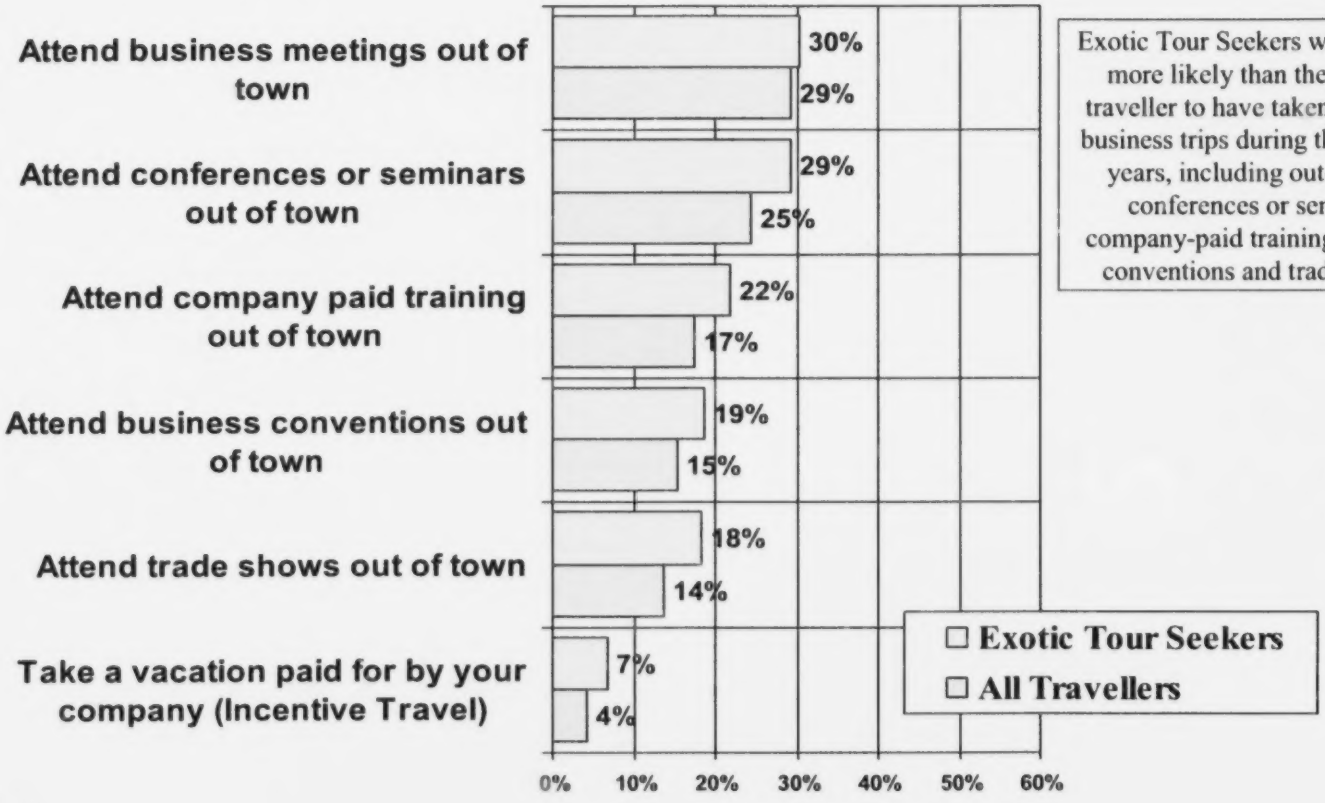
Technical Note

This analysis is based on a factor analysis of the same day and overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Percent Taking Various Types of Overnight Business Trip During Past Two Years

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

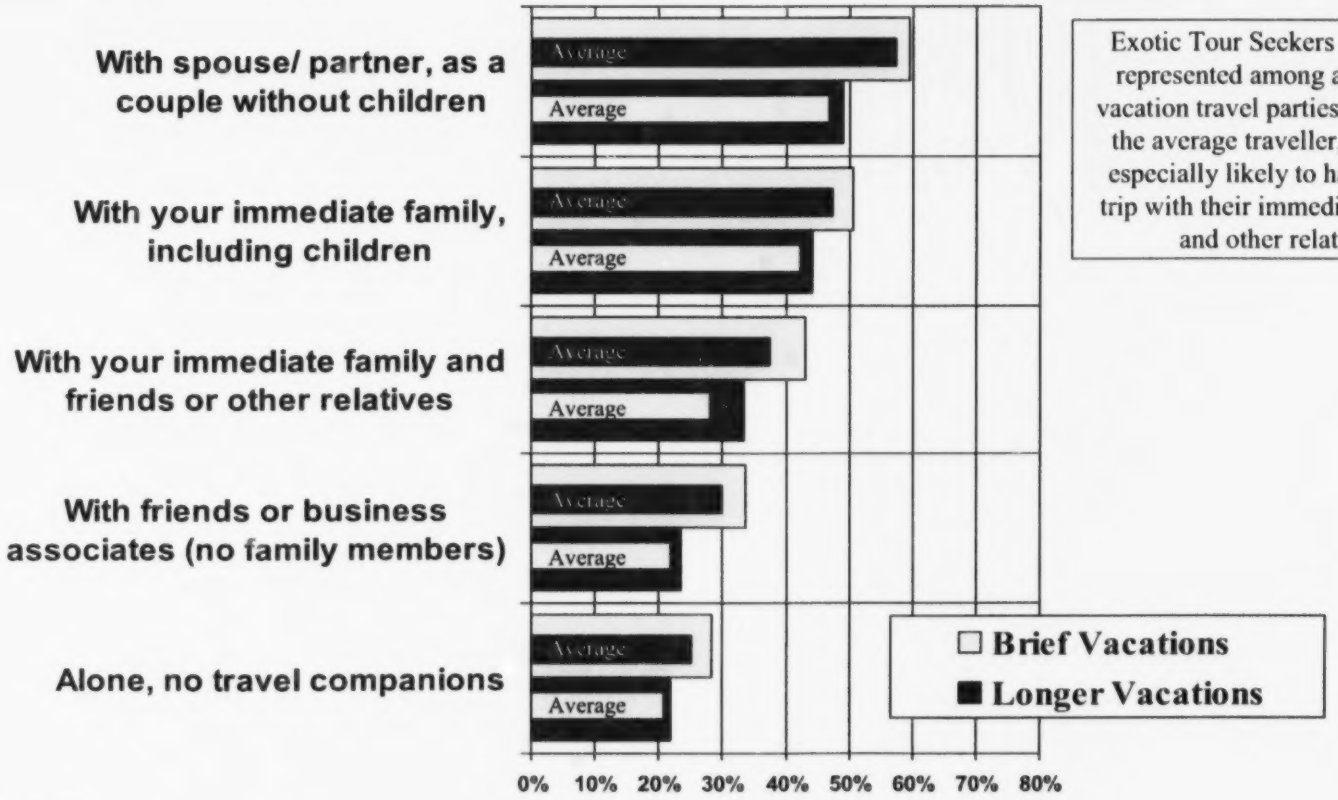


Exotic Tour Seekers were slightly more likely than the average traveller to have taken overnight business trips during the past two years, including out-of-town conferences or seminars, company-paid training, business conventions and trade shows.

Composition of Travel Party for Brief and Longer Trips During Past Two Years

Exotic Trip Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

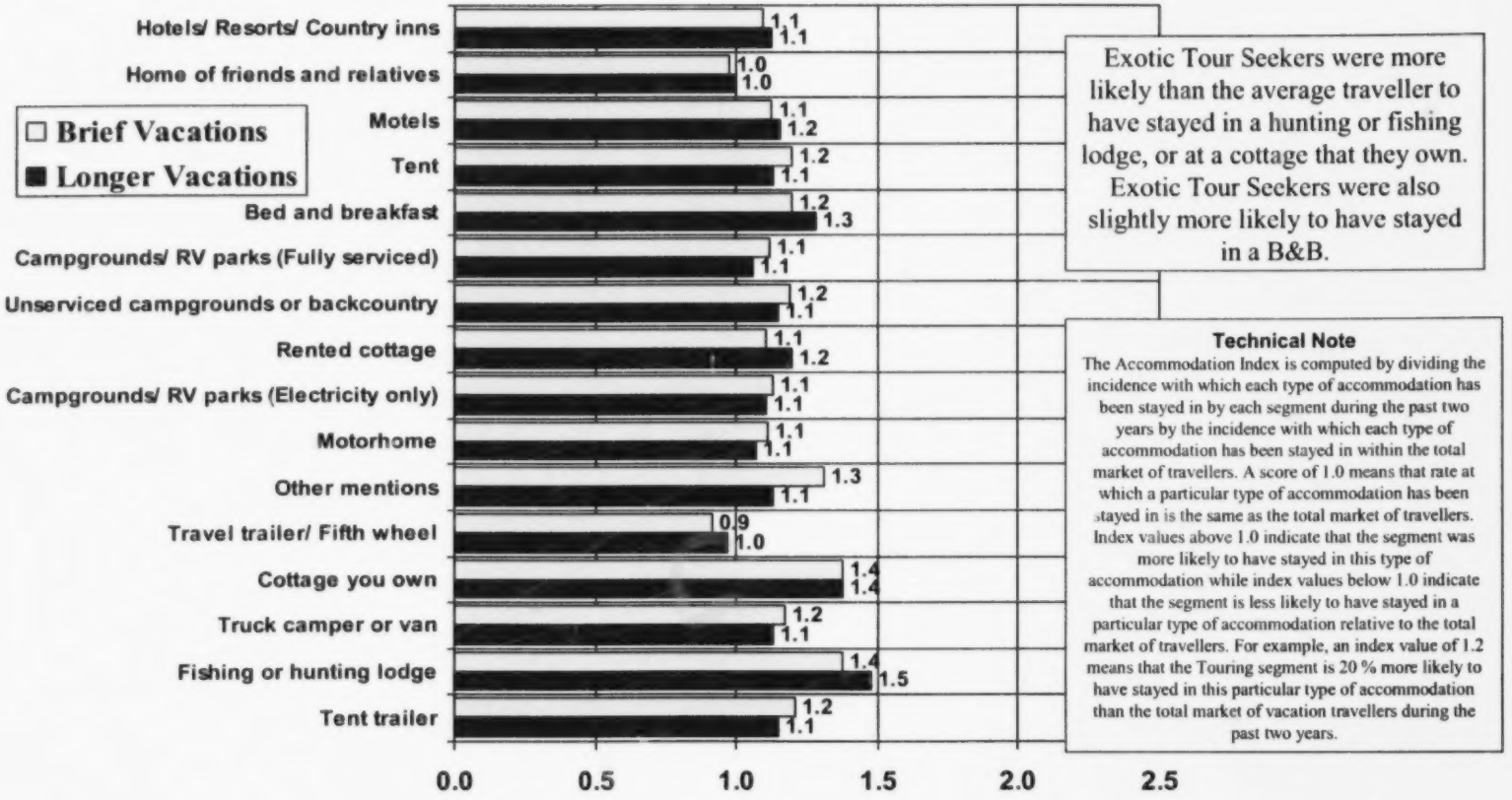


Exotic Tour Seekers were over-represented among all types of vacation travel parties. Relative to the average traveller, they were especially likely to have taken a trip with their immediate families and other relatives.

Types of Accommodations Used for Brief and Longer Trips During Past Two Years (Indexed)

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Exotic Tour Seekers were more likely than the average traveller to have stayed in a hunting or fishing lodge, or at a cottage that they own. Exotic Tour Seekers were also slightly more likely to have stayed in a B&B.

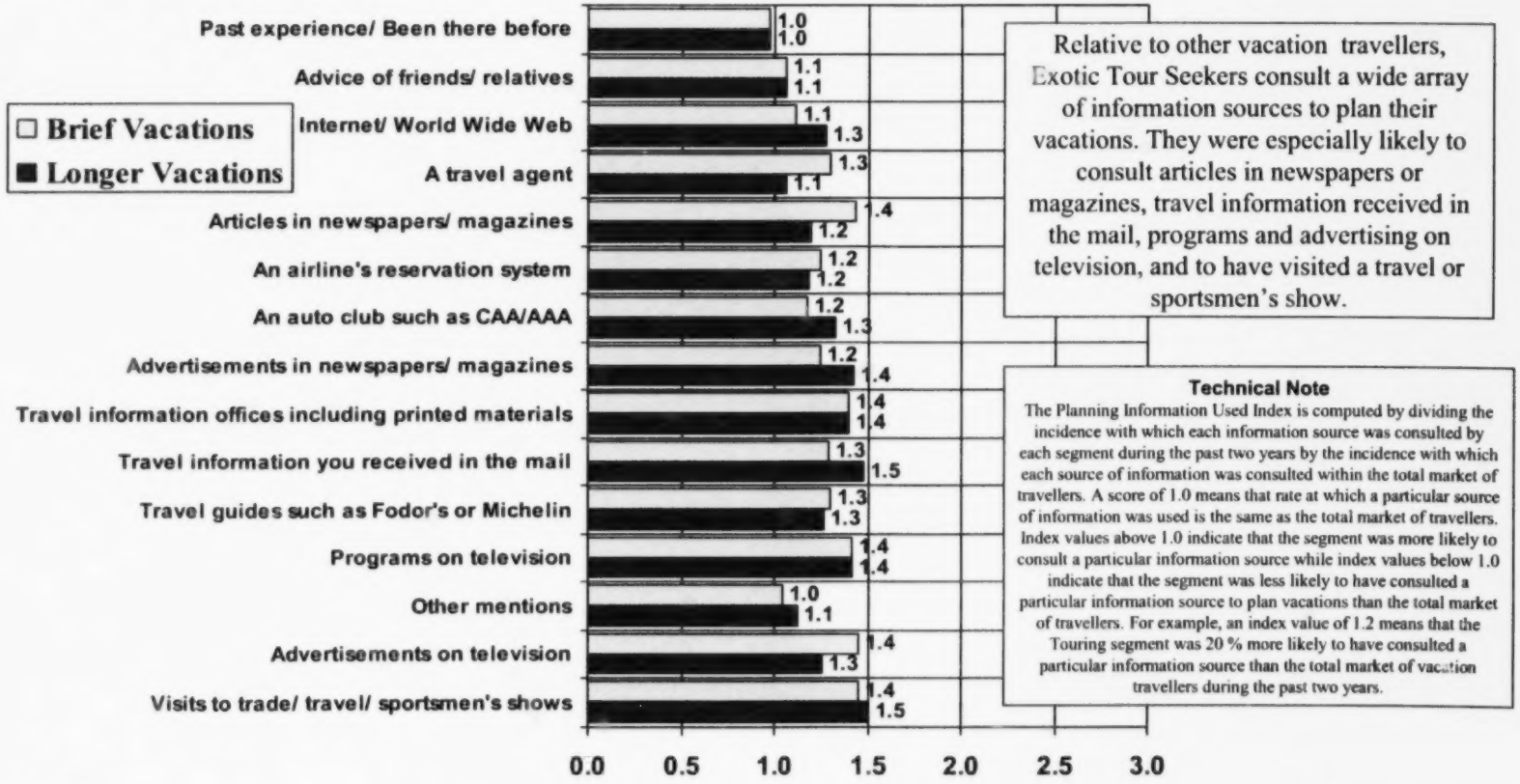
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to have stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of vacation travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past Two Years (Indexed)

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to other vacation travellers, Exotic Tour Seekers consult a wide array of information sources to plan their vacations. They were especially likely to consult articles in newspapers or magazines, travel information received in the mail, programs and advertising on television, and to have visited a travel or sportsmen's show.

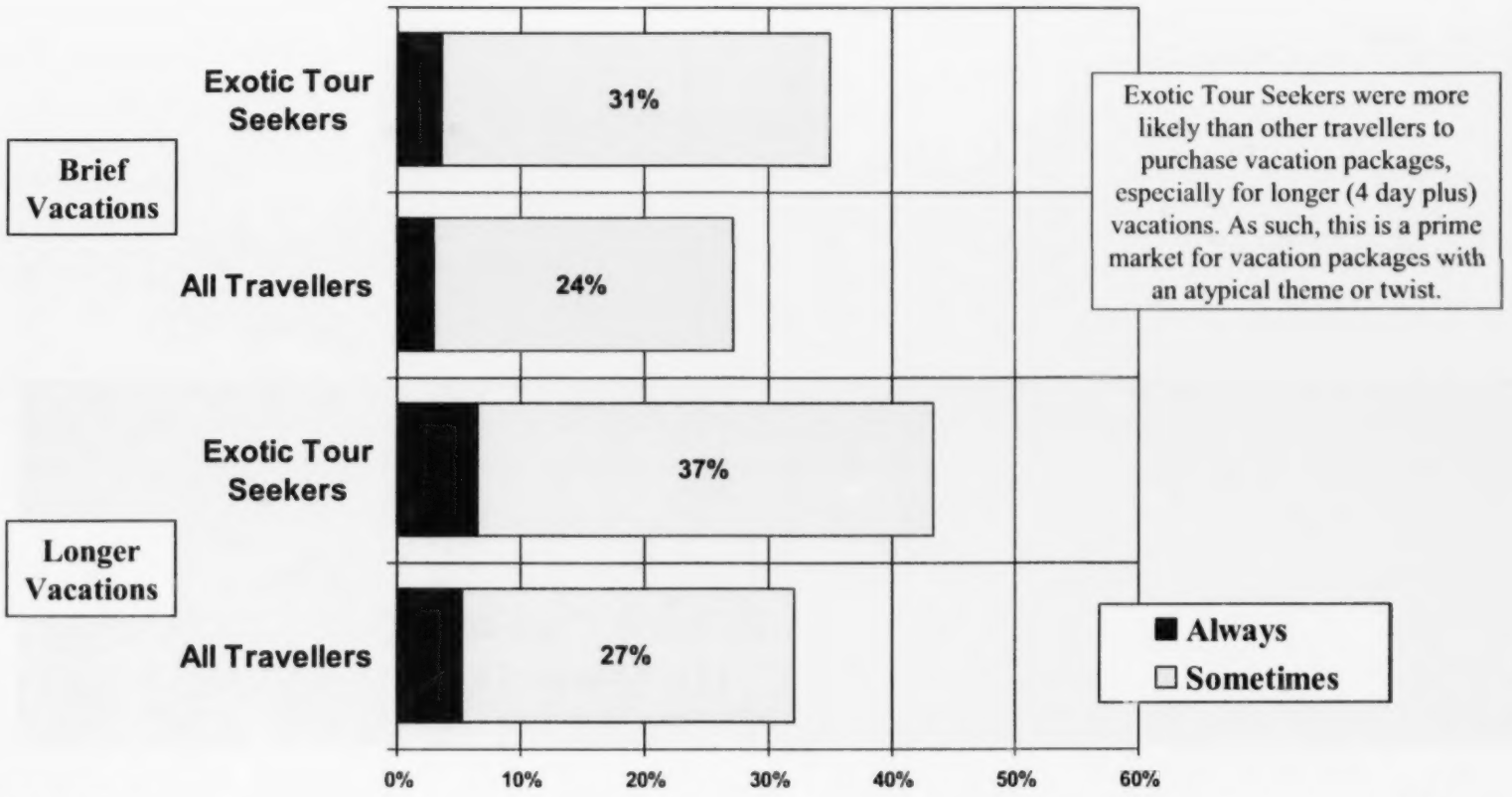
Technical Note

The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of travellers. For example, an index value of 1.2 means that the Touring segment was 20 % more likely to have consulted a particular information source than the total market of vacation travellers during the past two years.

How Often Travel Packages Used for Brief and Longer Vacations During Past Two Years

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media Index for Print Media: Canada & United States

Exotic Tour Seekers

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Travellers
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

Media indexing for various types of print media (see Technical Note below) suggests that Exotic Tour Seekers are active consumers of travel-related print media including travel magazines, the travel section of daily newspapers and, to a lesser extent, National Geographic and the travel section of weekend newspapers.

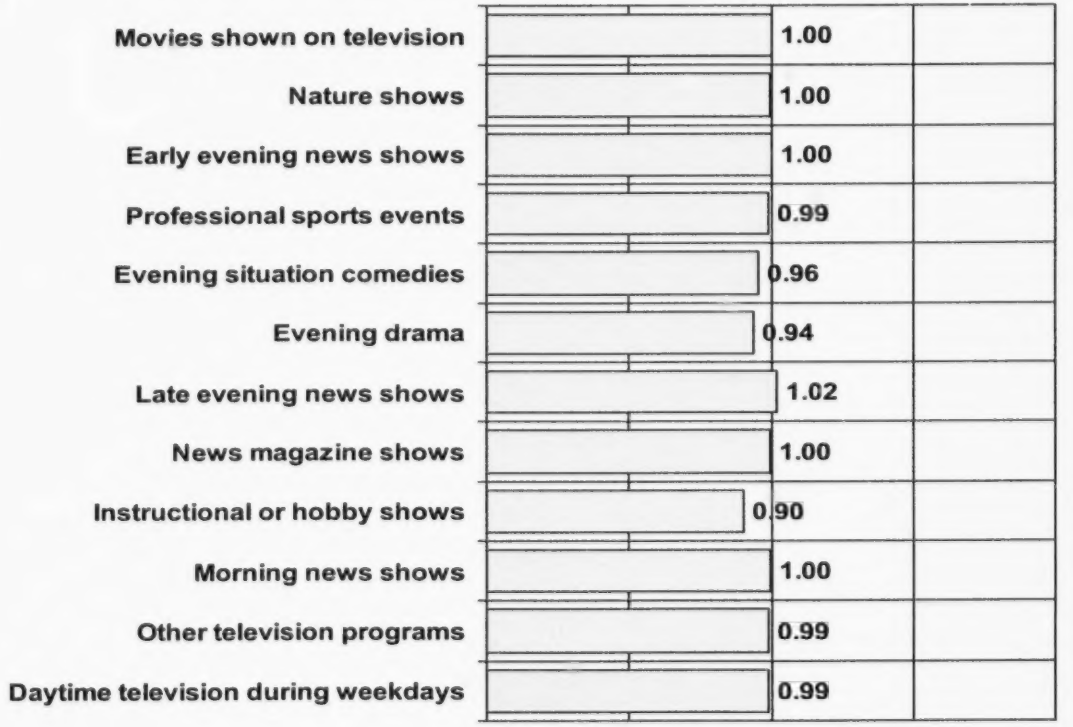
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that Exotic Tour Seekers were 20 % more likely to read a particular publication than the total market of vacation travellers.

Media Index for Television Programming: Canada & United States

Exotic Tour Seekers

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Travellers
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Exotic Tour Seekers exhibit average viewership of most types of television programming. As such, television does not appear to be a particularly efficient way to communicate with this segment.

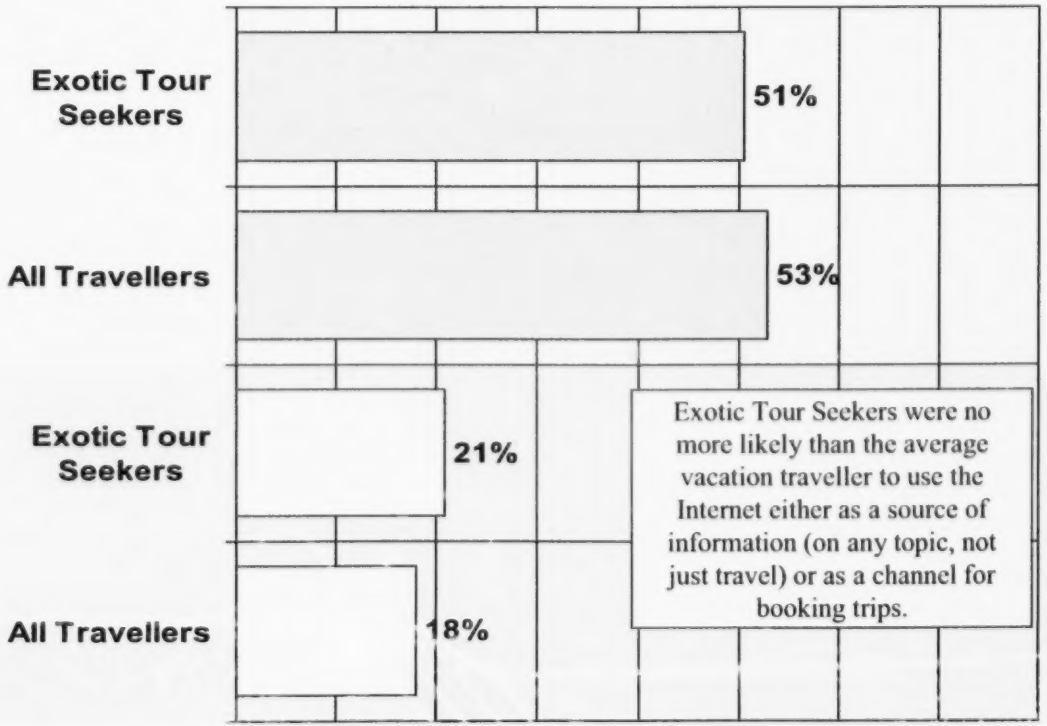
Technical Note

The Media Index is computed by dividing the percent within each segment routinely watching each program by the percent in the total market who routinely watches each program. A score of 1.0 means that viewership is the same as the total market. Index values above 1.0 indicate that the viewership is above average while index values below 1.0 indicate that viewership is below average. For example, an index value of 1.2 means that Exotic Tour Seekers were 20 % more likely to watch a particular program than the total market of vacation travellers.

Percent Using Internet and Booking At Least One Trip Using the Internet

Exotic Tour Seekers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



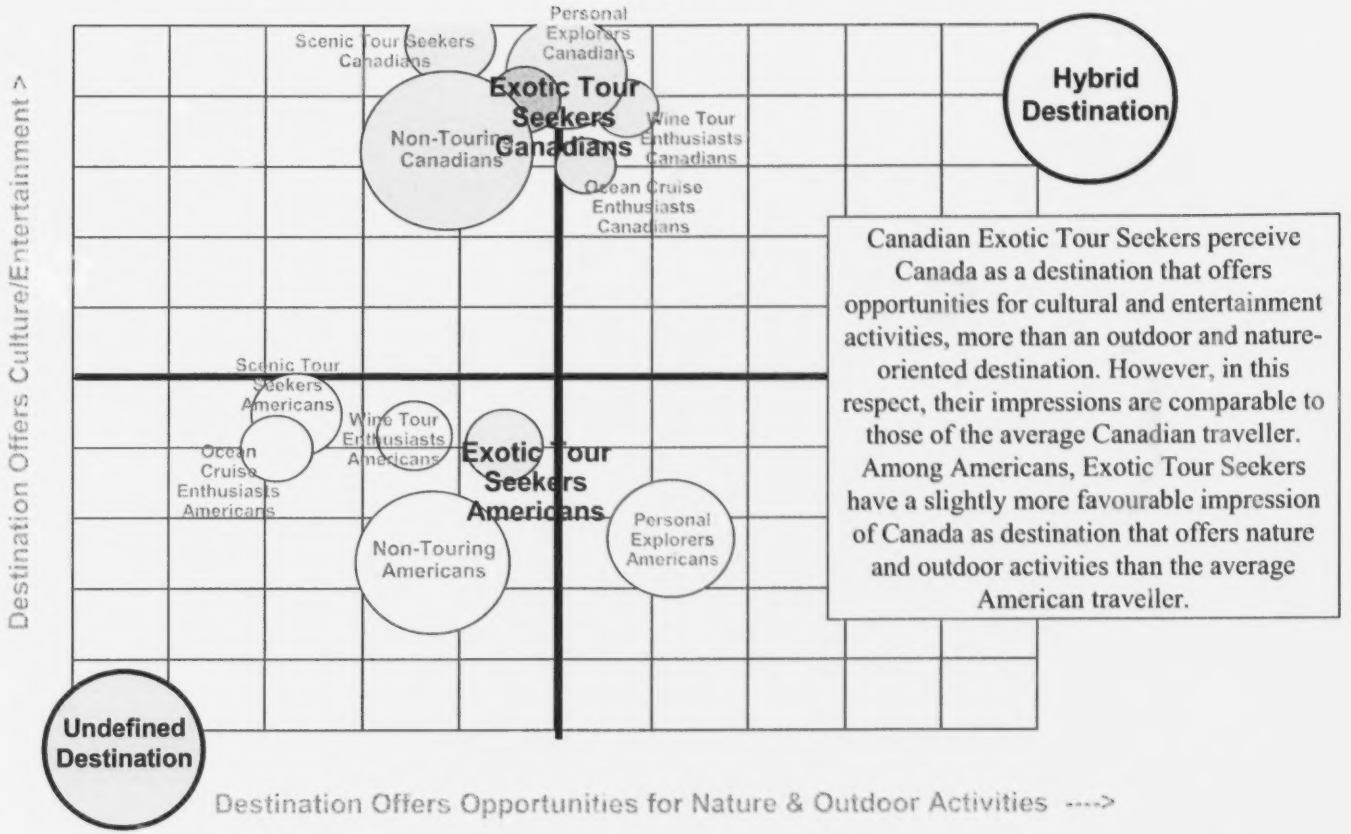
Uses Internet For Research (Any Topic)

Booked Trip Using Internet (Last Two Years)

Vacation Imagery of Canada

Exotic Tour Seekers

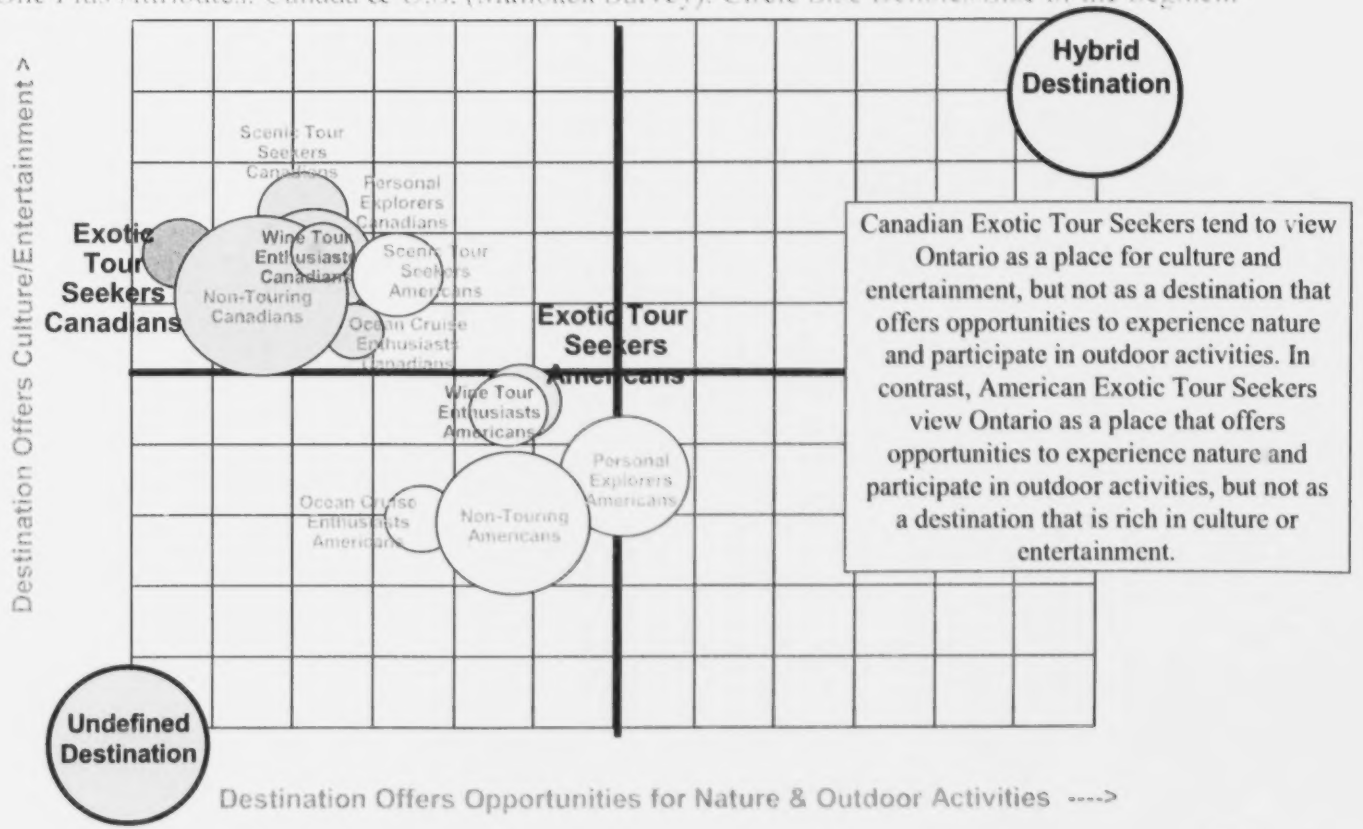
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



Vacation Imagery of Ontario

Exotic Tour Seekers

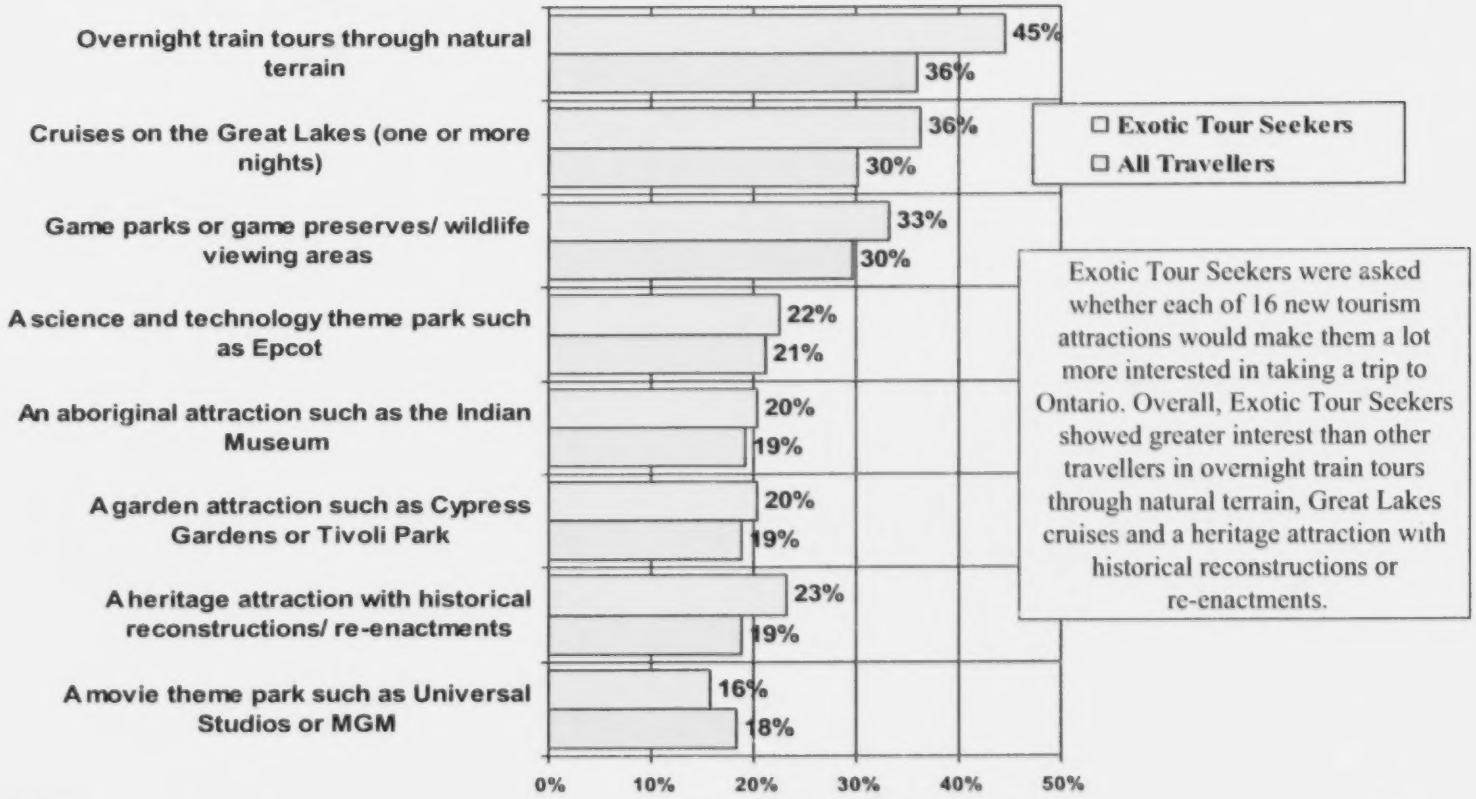
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



Interest in New Tourism Products

Exotic Tour Seekers (Part One of Two)

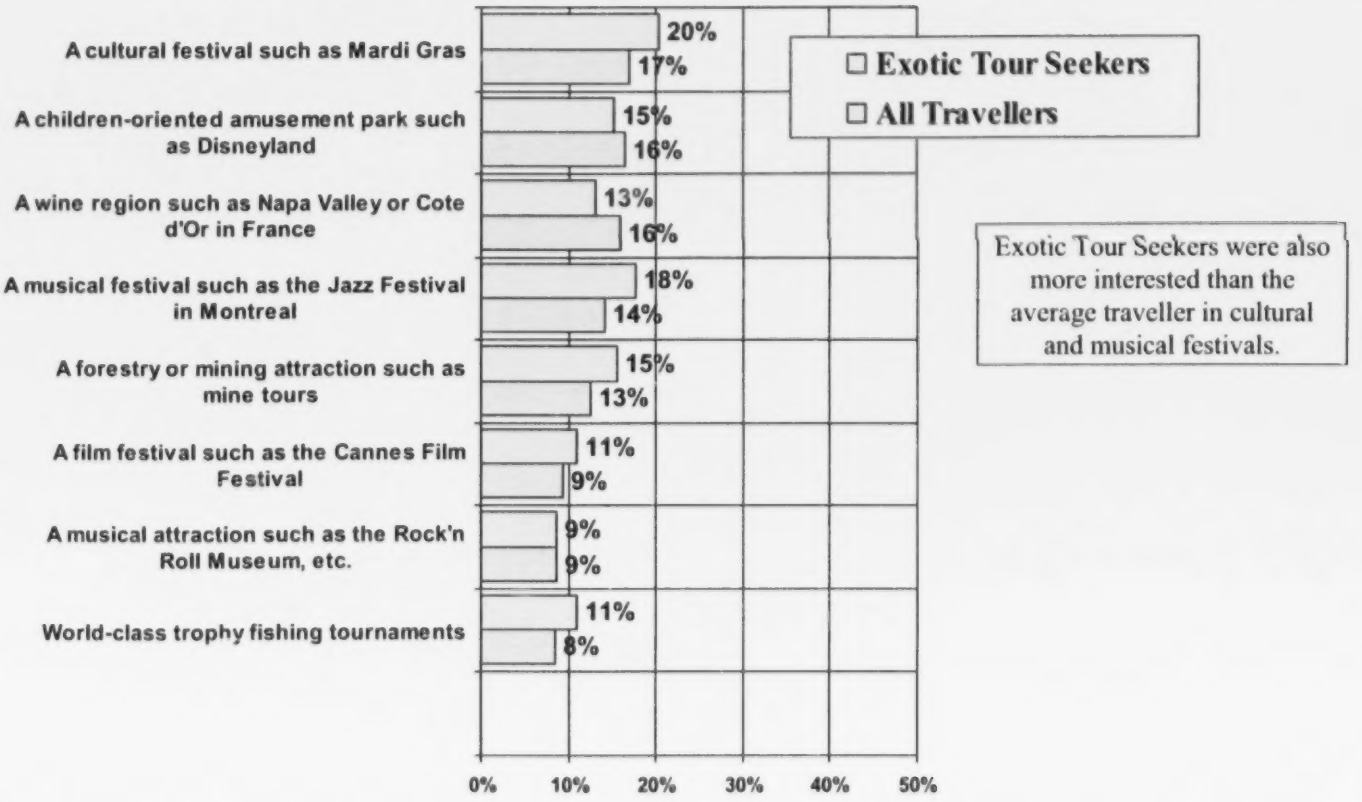
Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Interest in New Tourism Products

Exotic Tour Seekers (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Exotic Tour Seekers were also more interested than the average traveller in cultural and musical festivals.

Section Seven

Ocean Cruise Enthusiasts

Detailed Segment Profile

Ocean Cruise Enthusiasts

Ocean Cruise Enthusiasts were the smallest of the touring segments, accounting for only 5.3 % of Canadian travellers and 8.0 % of American travellers. They have the highest household incomes of the five touring segments ($66,700), and are also the oldest. Affluent Mature and Senior Couples and Mainstream Senior Couples were especially over-represented within this segment, although Affluent Young Couples and Affluent Couples were also over-represented.

Ocean Cruise Enthusiasts are clearly drawn to southern destinations. They are three times more likely than other travellers to have visited Mexico or the Caribbean in the past two years. They were also more likely than the average traveller to have visited other international vacation destinations (22% versus 14%). Their vacation travel exhibits a clear seasonal pattern, as they were 14 % more likely to have taken a trip during the off-peak travel seasons (fall, winter and spring).

However, the Canadian travel activities of Ocean Cruise Enthusiasts were not negligible. Canadian Ocean Cruise Enthusiasts were more likely than the average traveller to visit Atlantic Canada and British Columbia during the past two years, and 70 % intended to take a trip in Canada over the next two years. American Ocean Cruise Enthusiasts parallel the average American traveller, both in terms of the incidence of trips to each Canadian province over the past two years, and in terms of their intention to visit Canada during the next two years.

Ocean Cruise Enthusiasts sought out vacation experiences that provided opportunities for personal indulgence and for exploration. Among their preferred personal indulgences, Ocean Cruise Enthusiasts were much more likely than other travellers to visit casinos and theme parks. Their preferred outdoor activities include sailing, swimming and sunbathing, viewing natural phenomena, and golfing. Their exploratory vacation pursuits included visiting museums, art exhibits and historical sites. Ocean Cruise Enthusiasts were also more likely than the average traveller to take guided tours of cities or the countryside, and to stay in hotels and seaside resorts.

Compared to other vacation travellers, Ocean Cruise Enthusiasts were more likely to use a travel agent and the Internet to plan their trips. One-quarter of Ocean Cruise Enthusiasts (25%) have also used the Internet to book at least one trip in the past two years. Ocean Cruise Enthusiasts relied more than others on travel information received in the mail, travel ads in newspapers and magazines, and travel magazines. They were also much more likely than other travellers to purchase travel packages for their trips.

Ocean Cruise Enthusiasts

Key Demographic Characteristics

Ocean Cruise Enthusiasts represent 5.3 % of Canadian travellers and 8.0 % of American travellers. They were the oldest of the five touring segments, with the highest household income, and above average postgraduate education. Senior Couples, Senior Singles and Mature Couples are over-represented among Ocean Cruise Enthusiasts.

Percent of Total Population:	4.7 % [Canada]; 7.1 % [United States]
Percent of Travellers:	5.3 % [Canada]; 8.0 % [United States]
Number of Individuals in Segment:	912,873 [Canada]; 12,150,083 [United States]
Average Age/Dominant Age Range:	48.3 years old; 46 and older (53.1 %)
Dominant Life Cycle Stages:	Senior Couples [Index=184; 12.1 %]
	Senior Singles [Index=127; 7.9 %]
	Mature Couples [Index=121; 24.2 %]
Household Income:	$66,700; 39.7 % HHI of $80K or more
Percent with Post-Secondary Education:	53.8 % University/College; 68.2 % Advanced Degrees
Dominant Occupation Status:	55.8 % Employed; 22.6 % Retired; 9.6 % Self-employed

Technical Note
See Appendix One for a description of each of the life cycle stages.

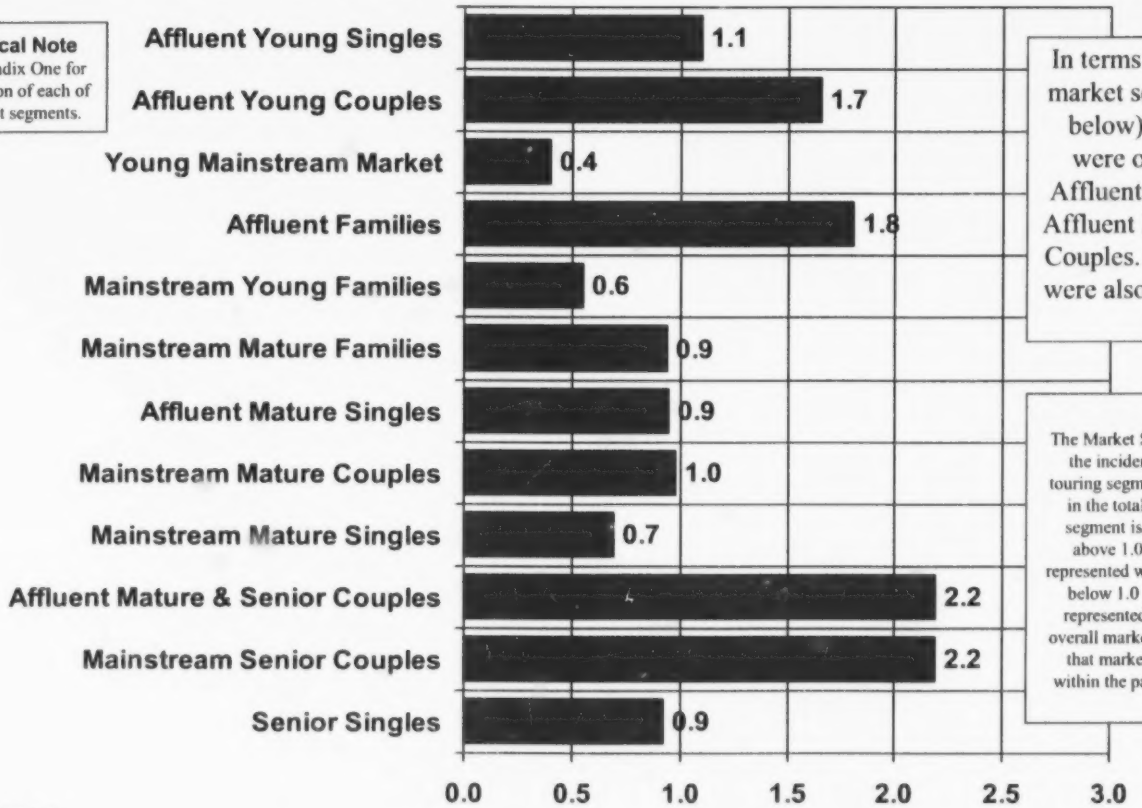
Touring Segmentation: Market Segment Indexing

Ocean Cruise Enthusiasts

Distribution of Market Segments within Ocean Cruise Enthusiasts Segment Divided By Distribution of Market Segments in Total Population

Base: Adult (18 Plus) U.S./Canadian Population Who Took a Trip in the Last Two Years

Technical Note
See Appendix One for a description of each of the market segments.



In terms of the demographic lifespan market segments (see Technical Note below), Ocean Cruise Enthusiasts were over-represented within the Affluent Mature and Senior Couples, Affluent Families and Affluent Young Couples. Mainstream Senior Couples were also over-represented within this touring segment.

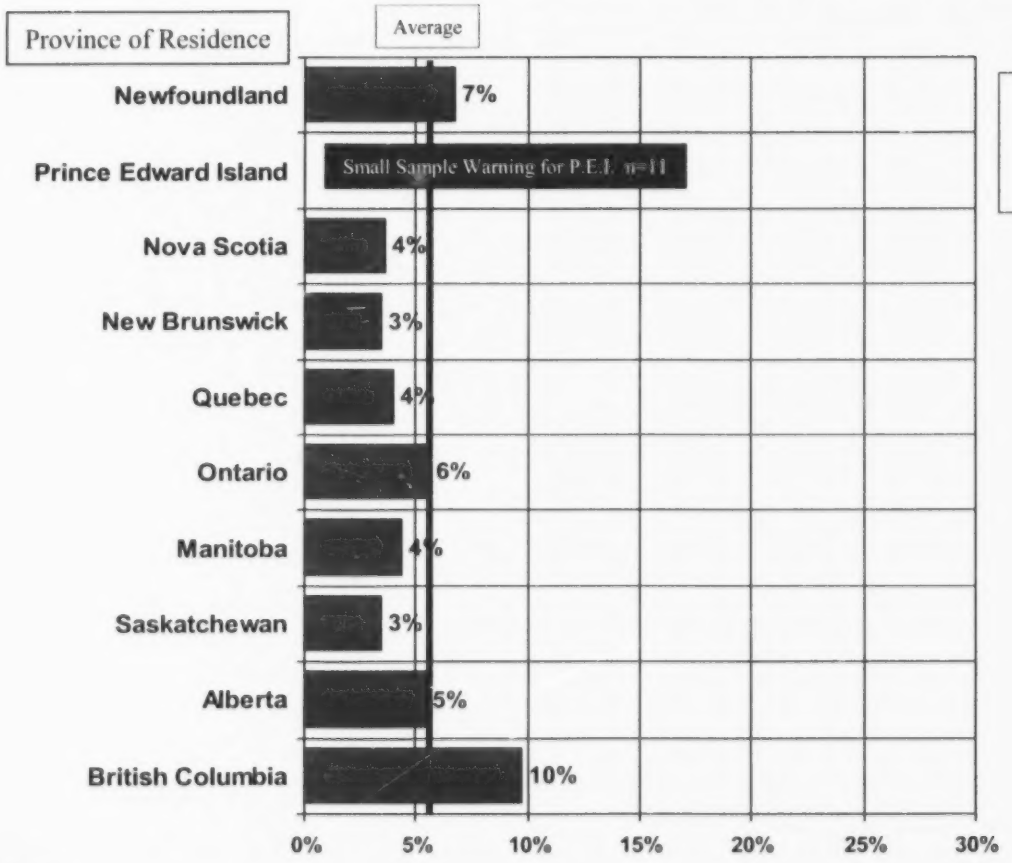
Technical Note

The Market Segmentation Index is computed by dividing the incidence of each market segment in a particular touring segment by the incidence of each market segment in the total market. A score of 1.0 means that market segment is the same as the total market. Index values above 1.0 indicate that the market segment is over-represented within the touring segment while index values below 1.0 indicate that the market segment is under-represented within the touring segment relative to the overall market. For example, an index value of 1.2 means that market segment is 20 % more likely to be found within the particular touring segment than in the general population.

Touring Segment Incidence in Canada

Ocean Cruise Enthusiasts: By Province

Base: Adult (18 Plus) Canadian Population Who Took a Trip or Plans to Take a Trip in Past Next Two Years

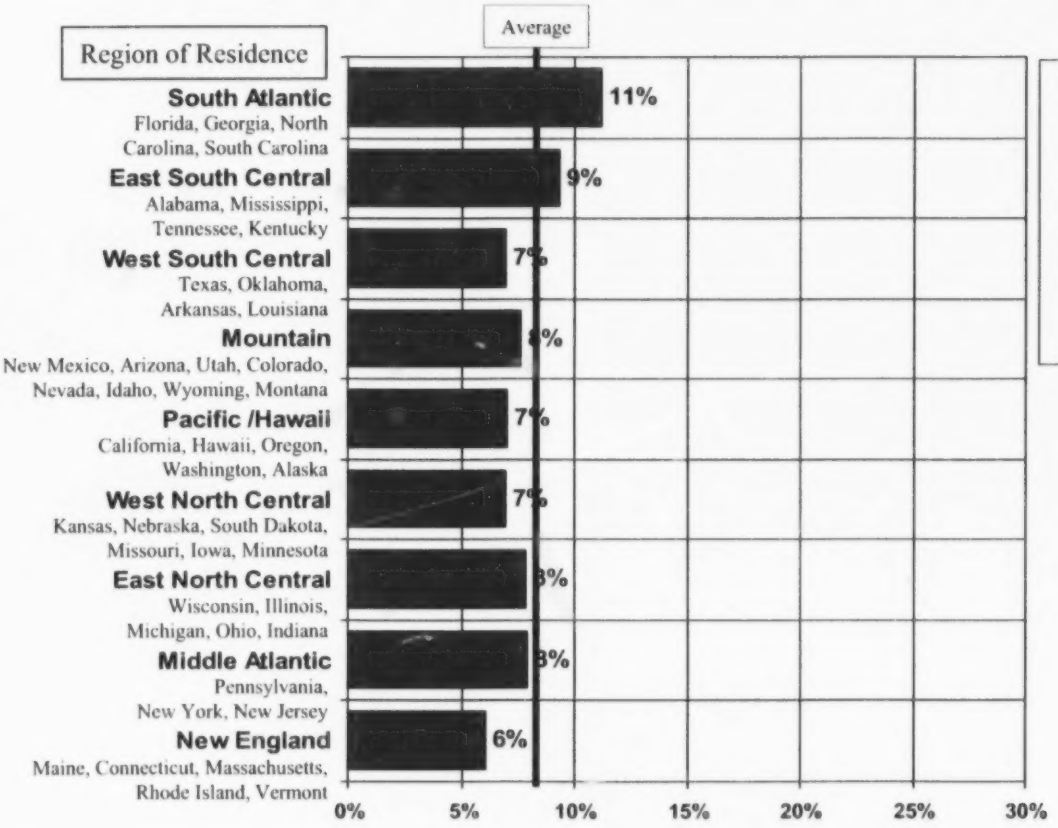


Among Canadians, Ocean Cruise Enthusiasts were more likely to be found in British Columbia than in other regions of the country.

Touring Segment Incidence in United States

Ocean Cruise Enthusiasts: By U.S. Region

Base: Adult (18 Plus) U.S. Population Who Took a Trip or Plans to Take a Trip in Past Next Two Years

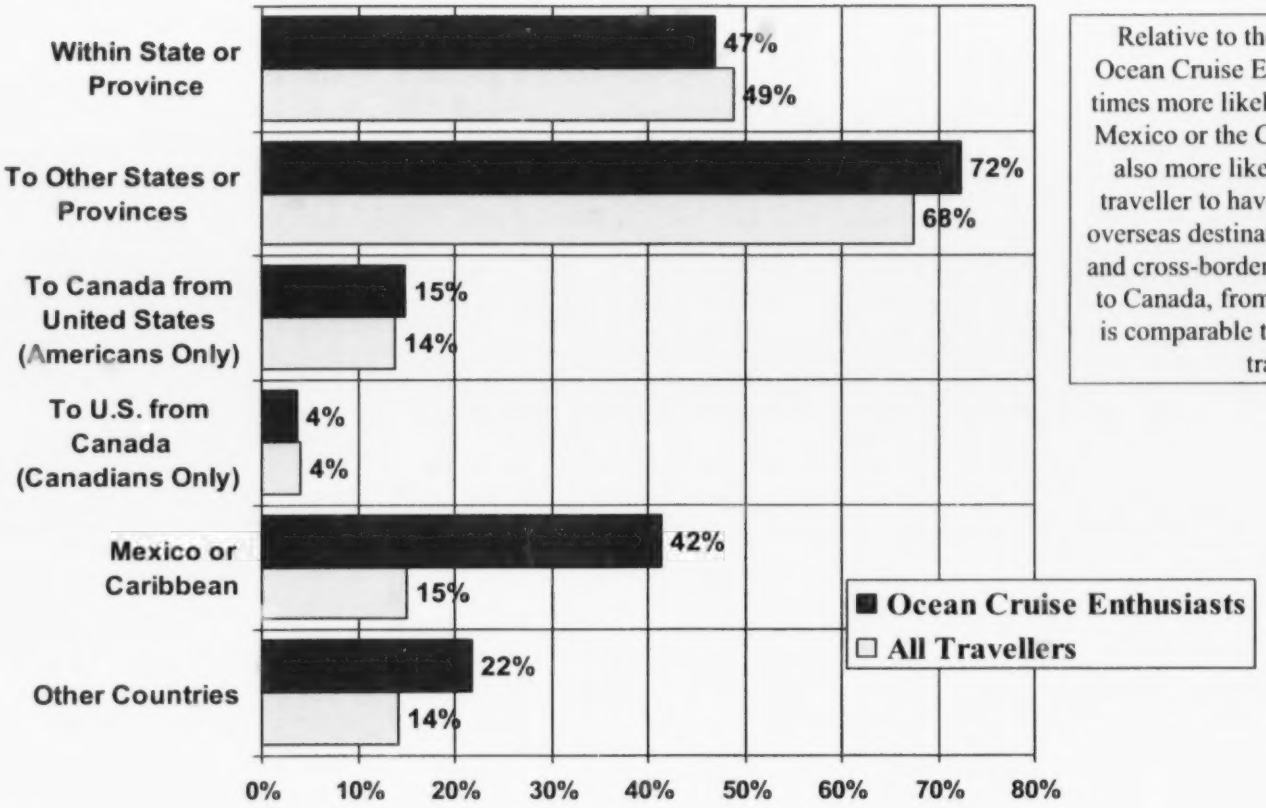


There was relatively little variation in the incidence of Ocean Cruise Enthusiasts across the nine regions of the United States, although this segment was somewhat more prevalent in the South Atlantic region. This finding likely reflects the proximity of these regions to the prime ocean cruise destinations of Mexico and the Caribbean.

Percent Taking Overnight Pleasure Trips to Various Destinations During Past Two Years

Ocean Cruise Enthusiasts

Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years

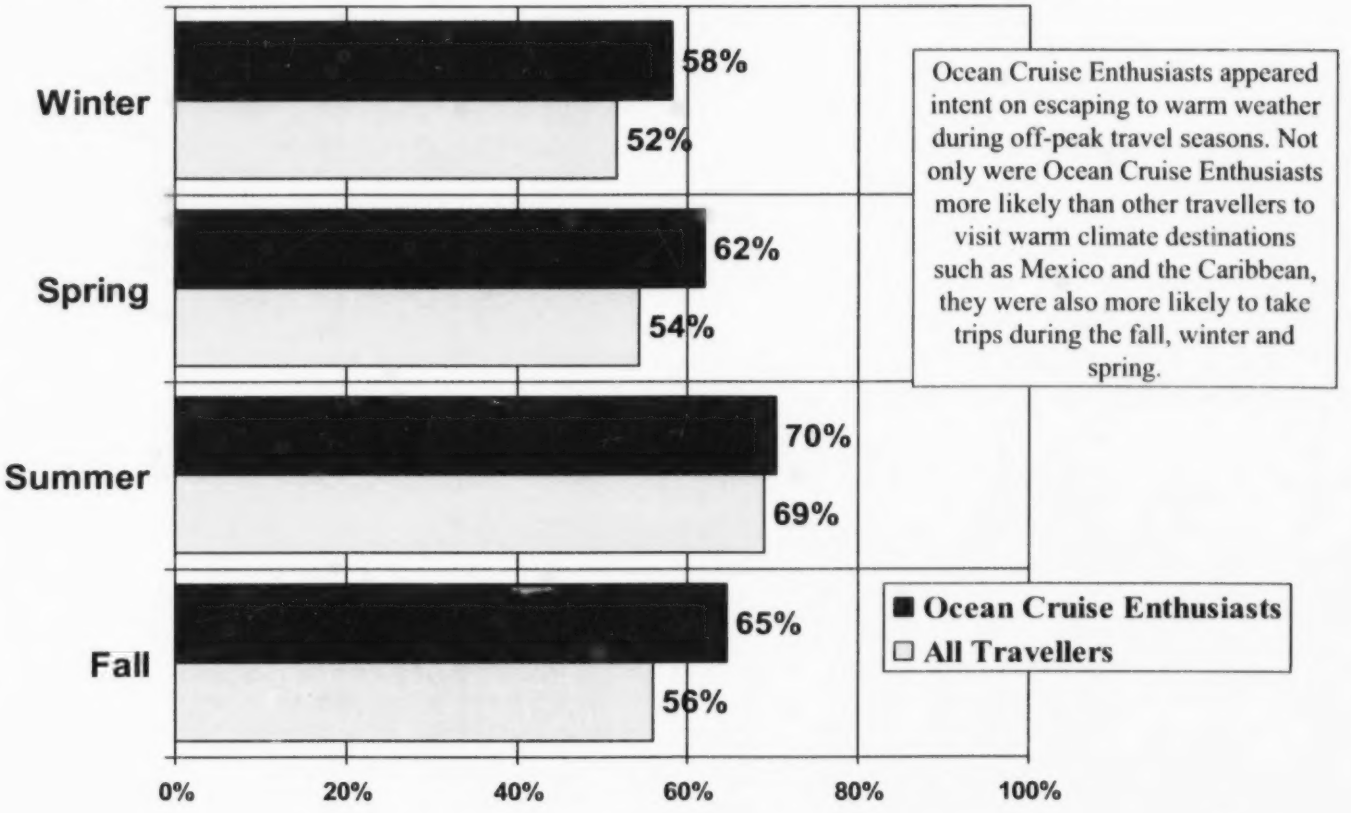


Relative to the average traveller, Ocean Cruise Enthusiasts were three times more likely to have travelled to Mexico or the Caribbean. They were also more likely than the average traveller to have taken trips to other overseas destinations. Their domestic and cross-border travel (from the U.S. to Canada, from Canada to the U.S.) is comparable to that of the average traveller.

Percent Taking Overnight Pleasure Trips to Various Destinations By Season During Past Two Years

Ocean Cruise Enthusiasts: Percent Taking Trip Each Season

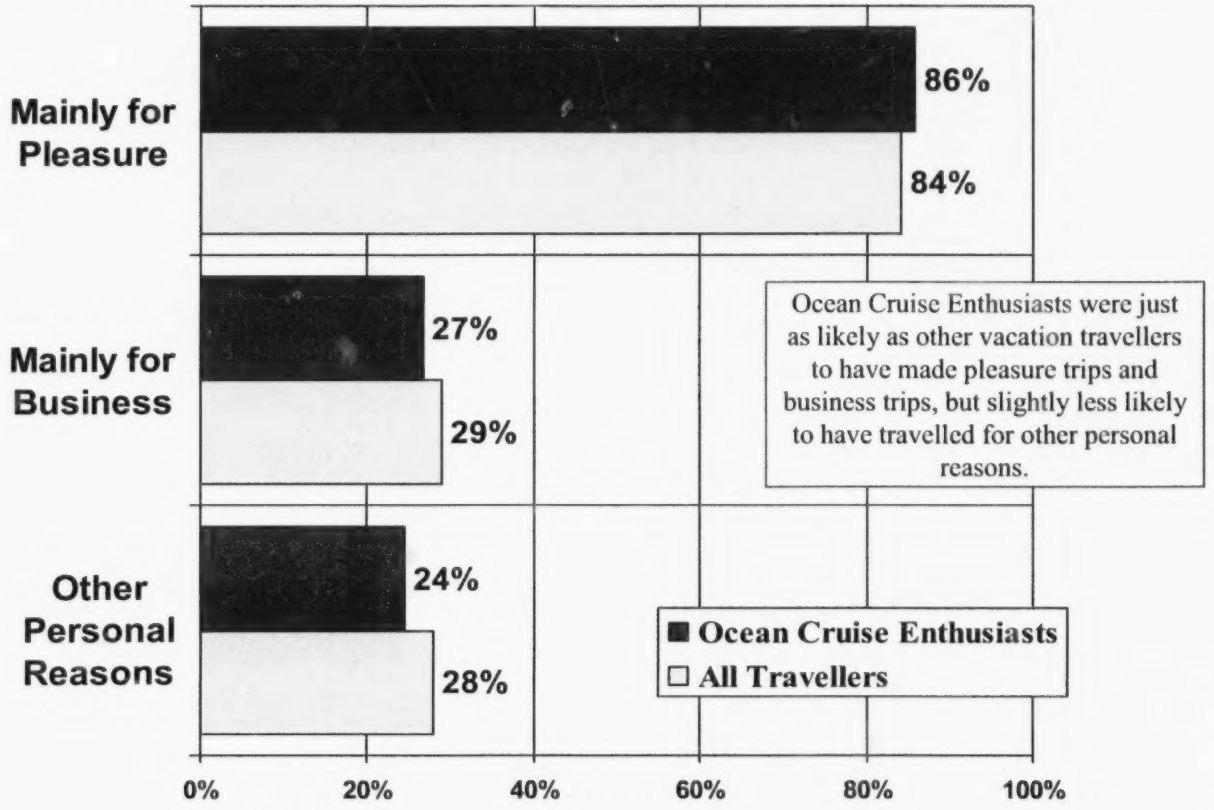
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years



Percent Taking Overnight Pleasure Trip to Various Destinations For Various Reasons During Past Two Years

Ocean Cruise Enthusiasts: Percent Taking Trip for Various Reasons

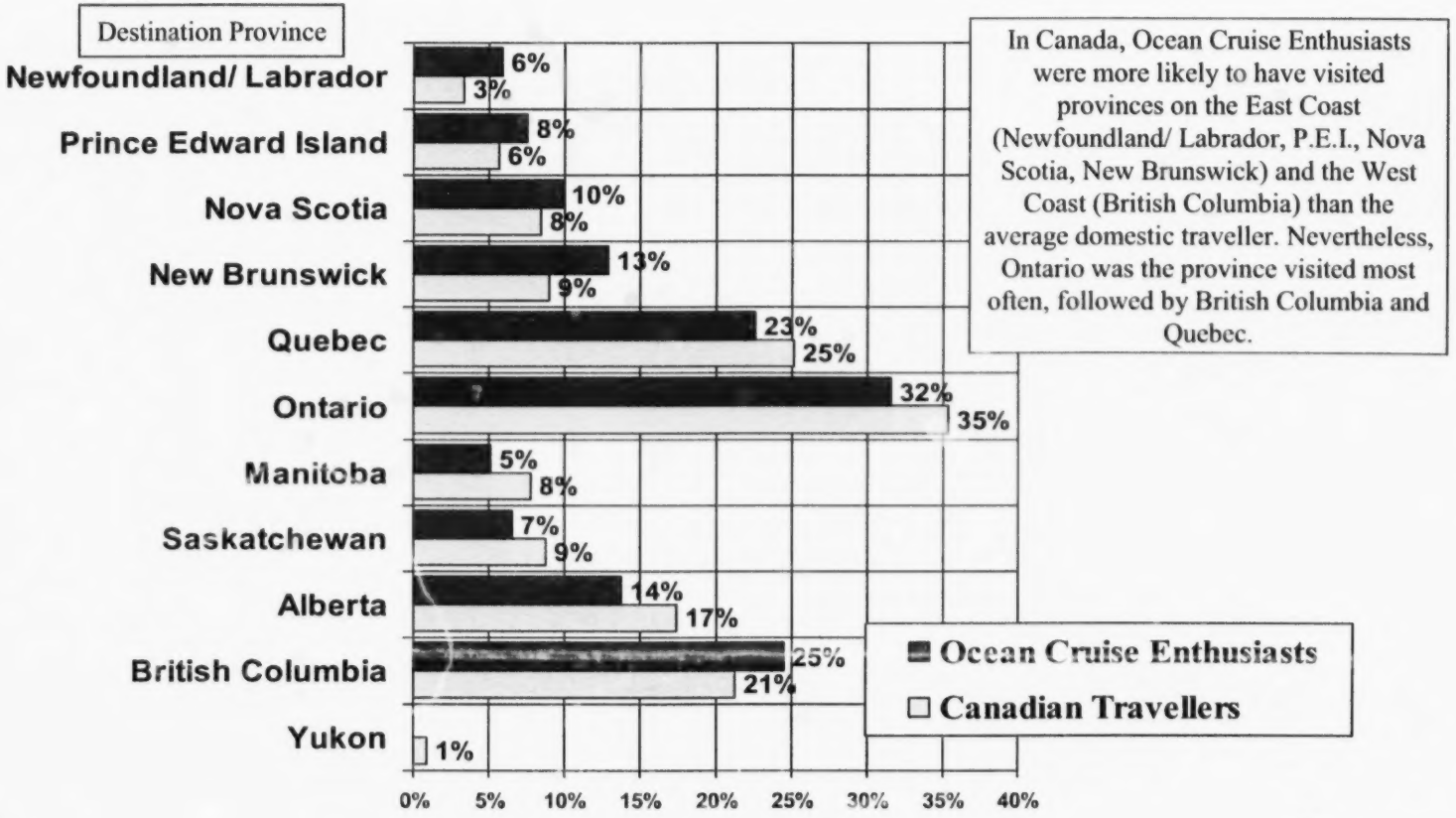
Base: Adult (18 Plus) U.S./Canadian Population Who Took a Vacation Trip in Past Two Years



Percent of Canadians Taking Overnight Pleasure Trip to Various Provinces During Past Two Years

Ocean Cruise Enthusiasts: Percent of Canadians Taking a Trip to Various Provinces

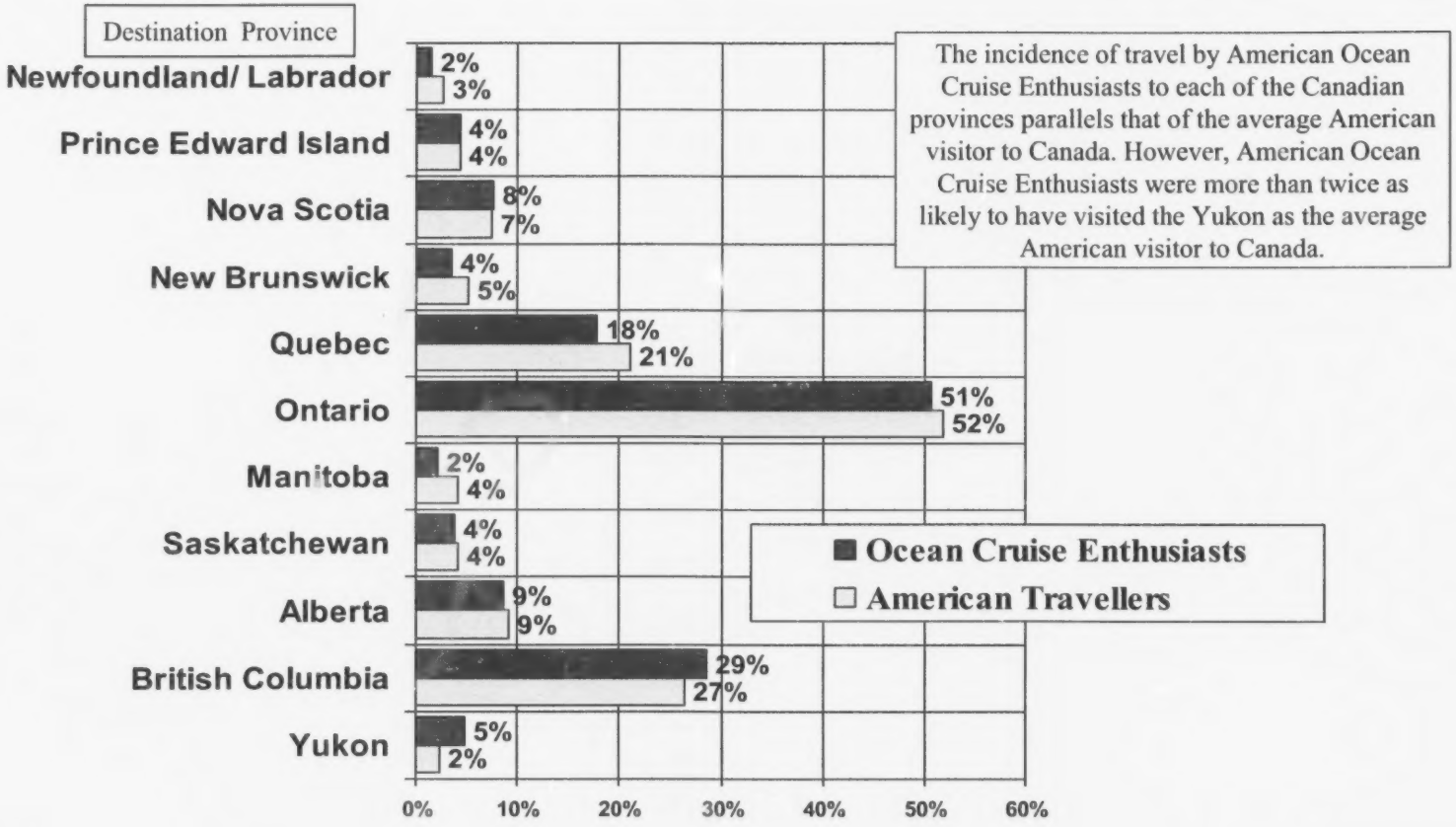
Base: Adult (18 Plus) Canadian Population Who Took a Vacation Trip and Trip Within Canada in the Past Two Years



Percent of Americans Taking Overnight Pleasure Trip to Various Provinces During Past Two Years

Ocean Cruise Enthusiasts: Percent of Americans Taking a Trip to Various Provinces

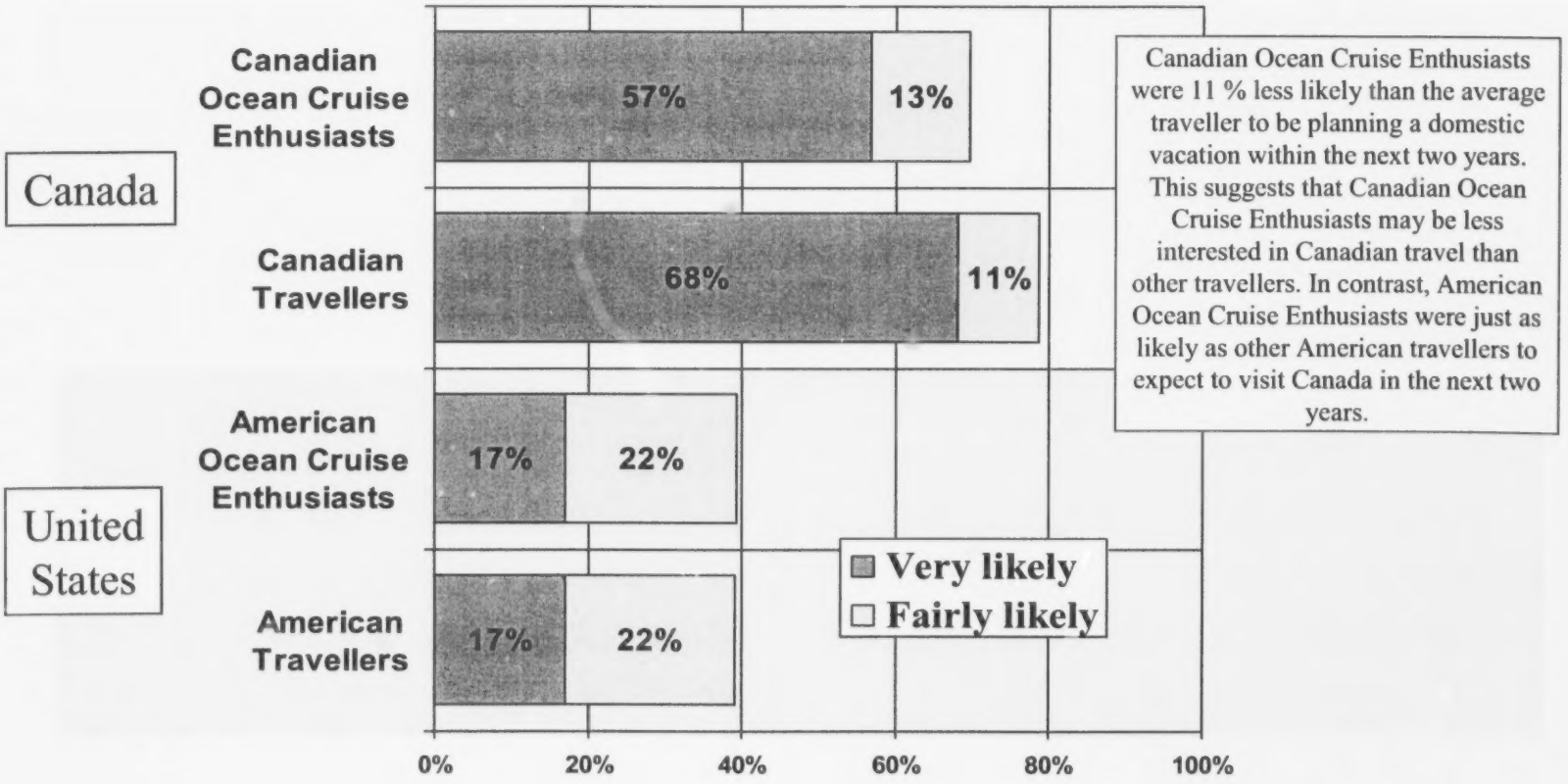
Base: Adult (18 Plus) U.S. Population Who Took an Urban Trip and a Trip to Canada in the Past Two Years



Touring Segmentation

Ocean Cruise Enthusiasts: Intentions to Travel Within/To Canada Next Two Years

Base: Adult Population (18 Plus) Who Took a Vacation Trip in Last Two Years

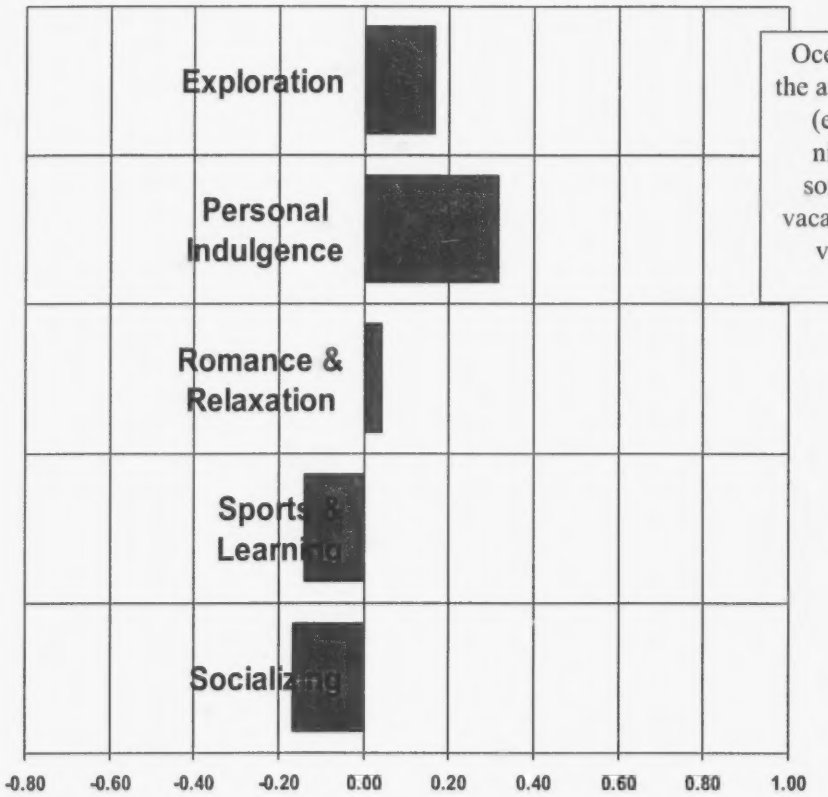


Canadian Ocean Cruise Enthusiasts were 11 % less likely than the average traveller to be planning a domestic vacation within the next two years. This suggests that Canadian Ocean Cruise Enthusiasts may be less interested in Canadian travel than other travellers. In contrast, American Ocean Cruise Enthusiasts were just as likely as other American travellers to expect to visit Canada in the next two years.

General Vacation Experiences Sought During Pleasure Travel in the Past Two Years

Ocean Cruise Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Ocean Cruise Enthusiasts were more likely than the average traveller to pursue personal indulgence (e.g., fine dining, casino gambling, enjoying nightlife) when vacationing. They were also somewhat more likely to seek out exploratory vacation experiences (e.g, visiting historical sites, visiting art galleries and museums) than the average traveller.

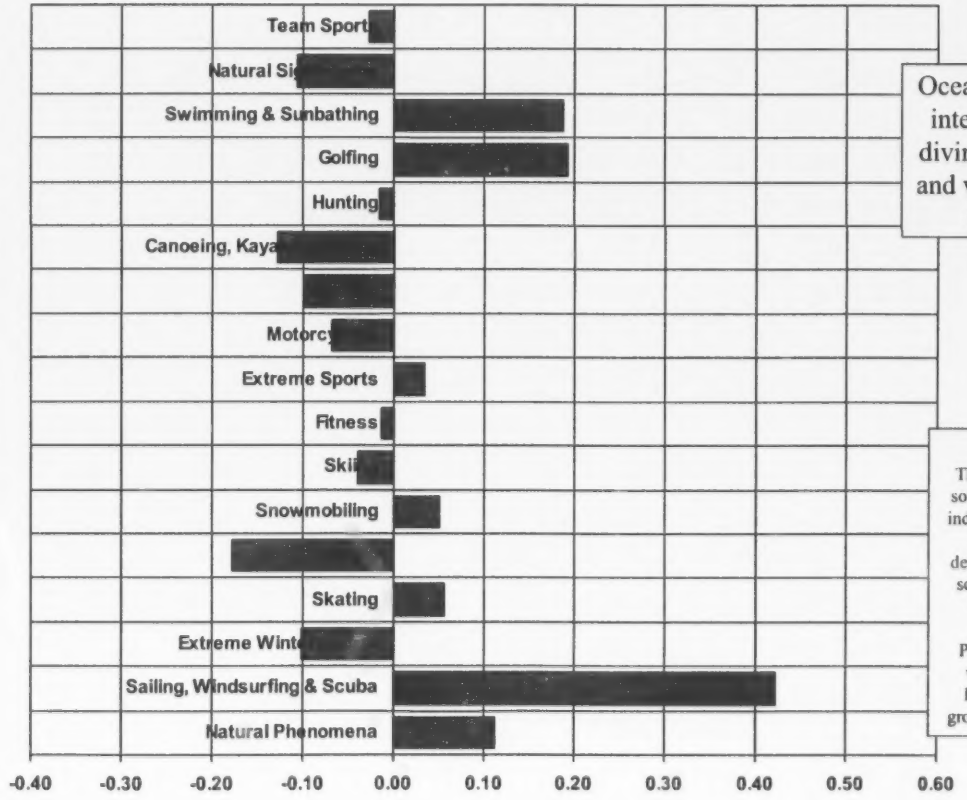
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past Two Years

Ocean Cruise Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Ocean Cruise Enthusiasts exhibit particular interest in sailing, windsurfing and scuba diving, swimming and sunbathing, golfing, and viewing natural phenomena. These are typically warm weather activities.

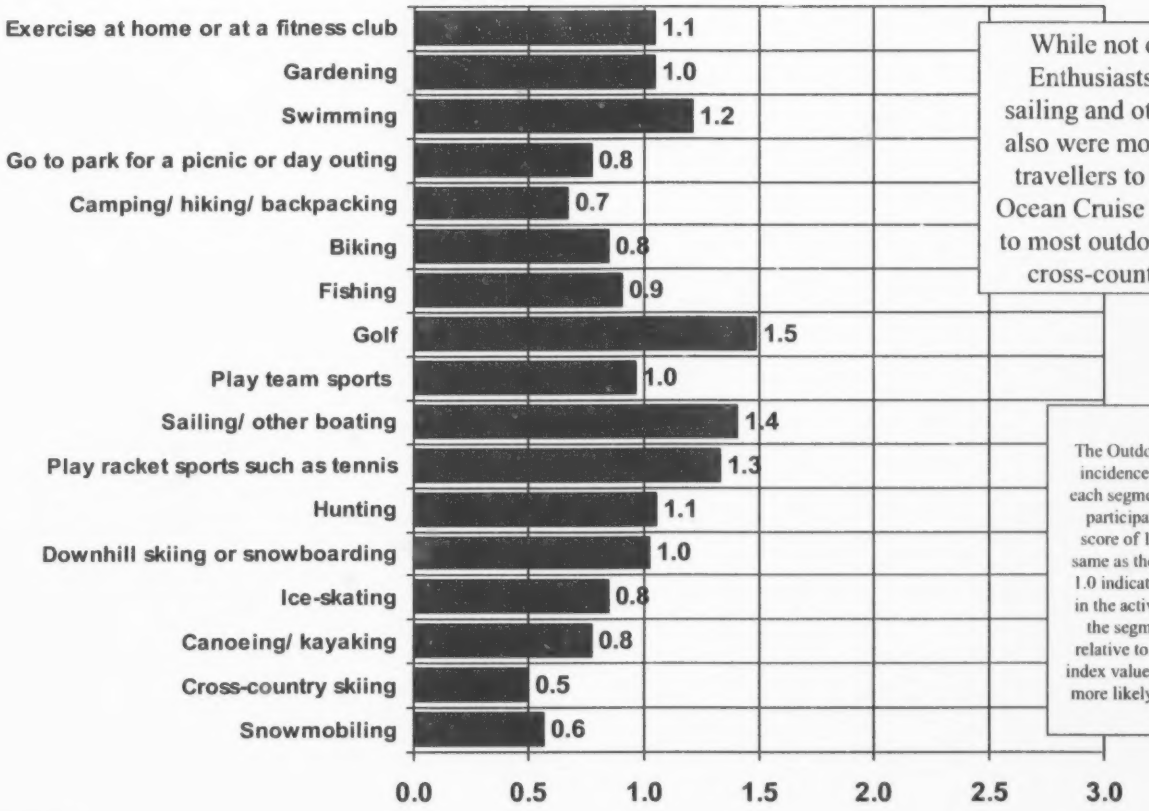
Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought While Not Travelling (Indexed)

Ocean Cruise Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Ocean Cruise Enthusiasts sustained their interest in sailing and other boating activities. They also were more likely than other vacation travellers to play golf and racket sports. Ocean Cruise Enthusiasts tend to be averse to most outdoor winter sports (ice-skating, cross-country skiing, snowmobiling).

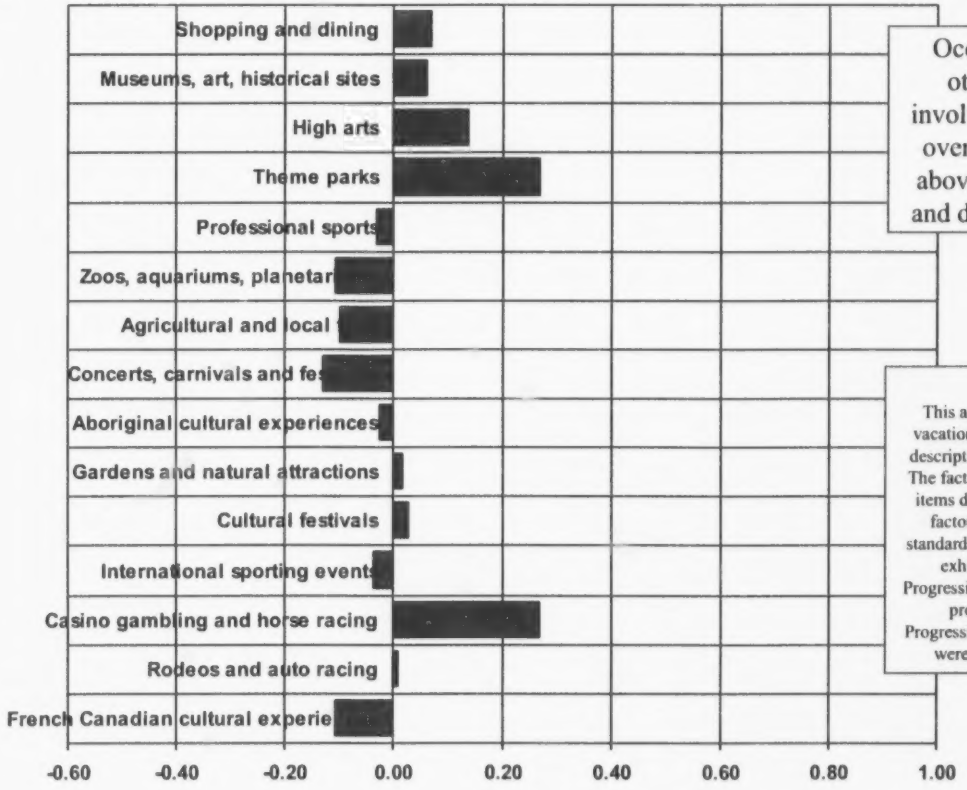
Technical Note

The Outdoor Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to participate in a given activity than the total market of vacation travellers.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past Two Years

Ocean Cruise Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Ocean Cruise Enthusiasts were more likely than other vacation travellers to seek out activities involving casinos and theme parks during their trips over the past two years. They also exhibit slightly above average interest in the high arts, in shopping and dining, and in museums, art and historical sites.

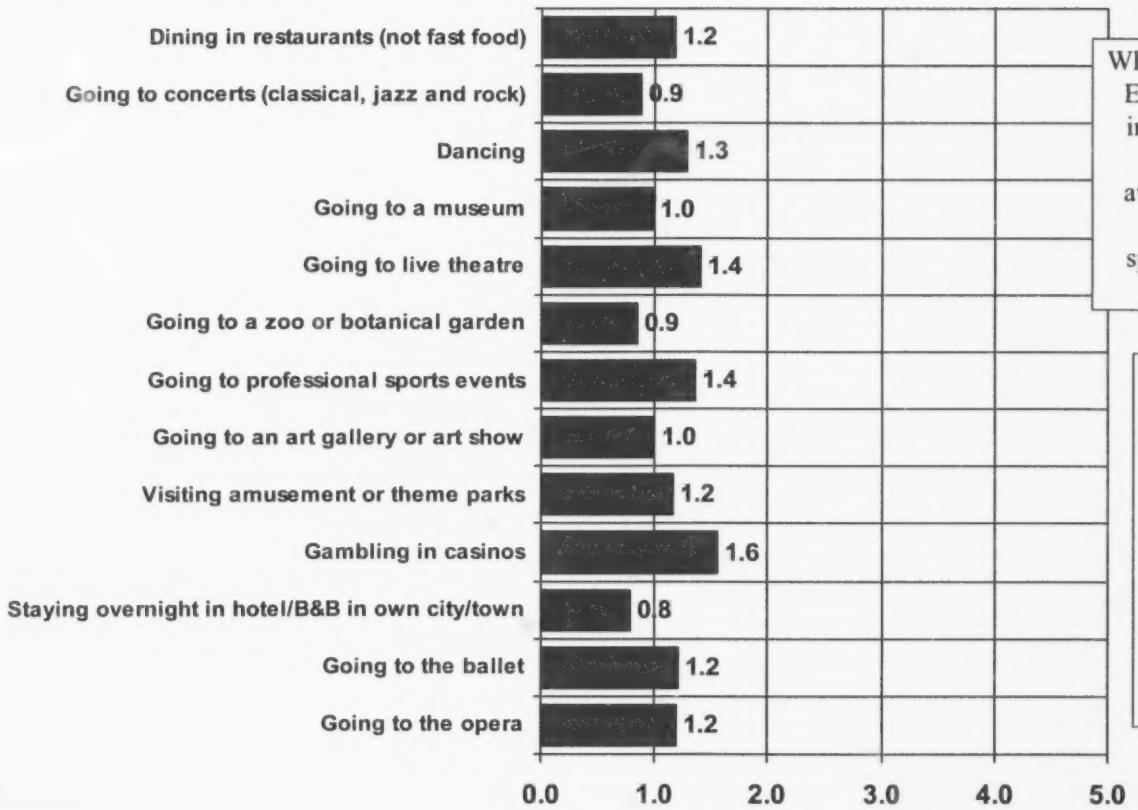
Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Cultural and Entertainment Activities Sought While Not Travelling (Indexed)

Ocean Cruise Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



While not on vacation, Ocean Cruise Enthusiasts also exhibit particular interest in casino gambling. They were also more likely than the average traveller to have attended live theatre and professional sporting events, and to have gone dancing.

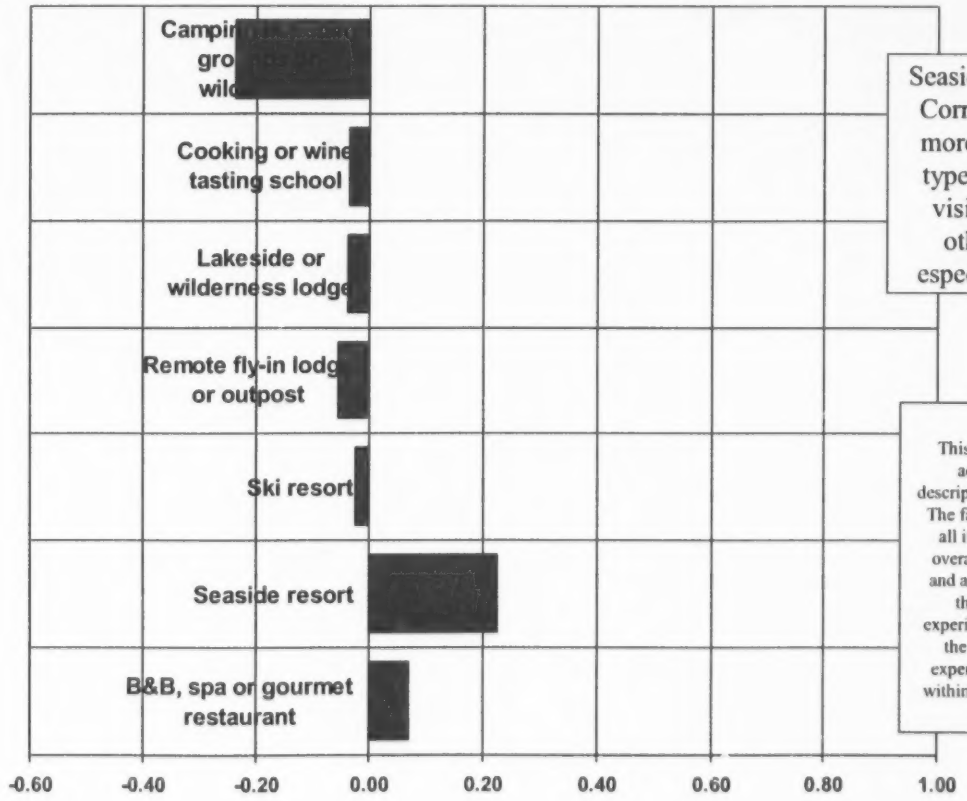
Technical Note

The Culture & Entertainment Activity Index is computed by dividing the incidence with which each activity is participated in by each segment by the incidence with which each activity is participated in within the total market of travellers. A score of 1.0 means that activity participation rate is the same as the total market of travellers. Index values above 1.0 indicate that the segment is more likely to participate in the activity while index values below 1.0 indicate that the segment is less likely to participate in the activity relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to participate in the activity than the total market of vacation travellers.

Accommodation-Related Activities Sought During Pleasure Travel in the Past Two Years

Ocean Cruise Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Seaside resorts are closely related to ocean cruises. Correspondingly, Ocean Cruise Enthusiasts were more likely than other travellers to patronize this type of accommodation-related activity. Besides visiting B&Bs, spas or gourmet restaurants, no other accommodation-related activities were especially attractive to Ocean Cruise Enthusiasts.

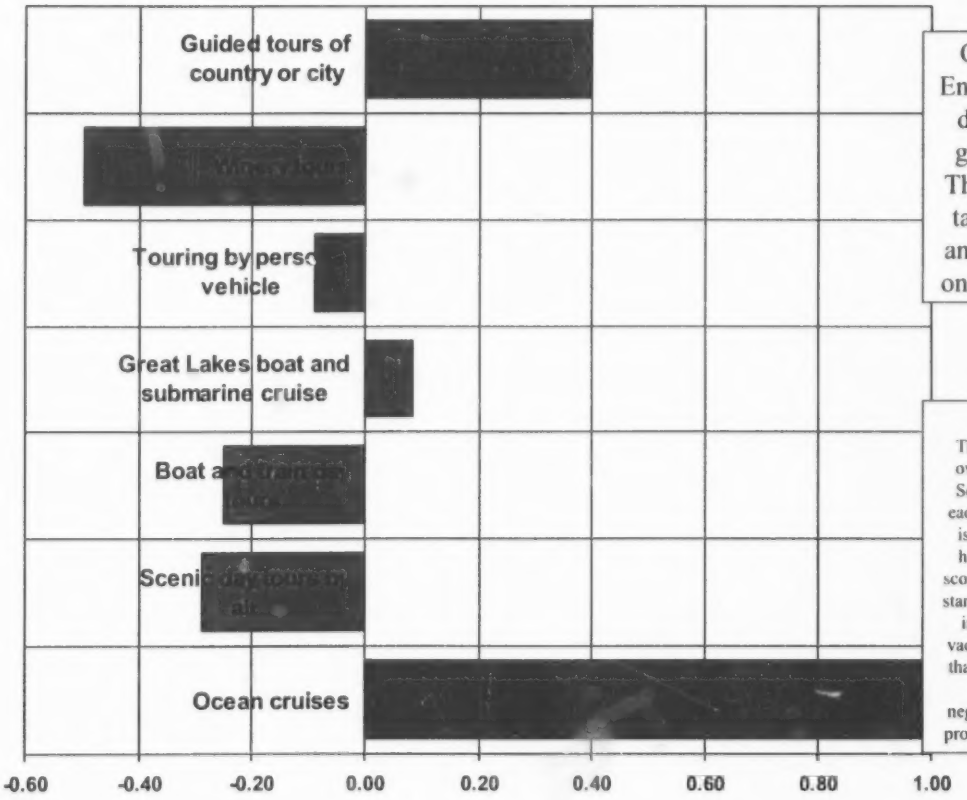
Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Day & Overnight Touring Activities in the Past Two Years

Ocean Cruise Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Other than ocean cruises, Ocean Cruise Enthusiasts only participated in a couple of day and overnight touring activities to a greater extent than the average traveller. They were more likely than others to have taken guided tours of the country or city, and slightly more likely to have embarked on a Great Lakes boat or submarine cruise.

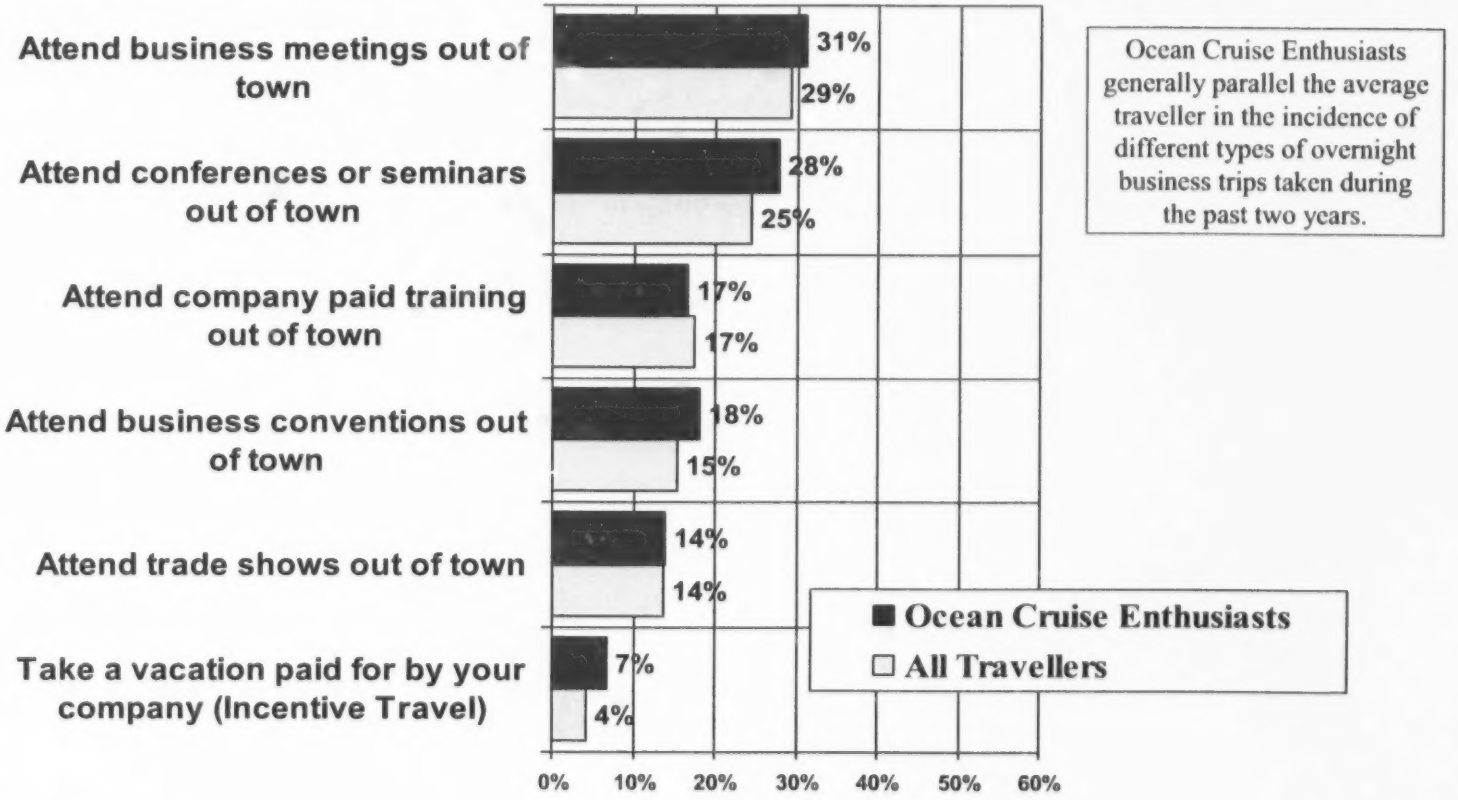
Technical Note

This analysis is based on a factor analysis of the same day and overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Percent Taking Various Types of Overnight Business Trip During Past Two Years

Ocean Cruise Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

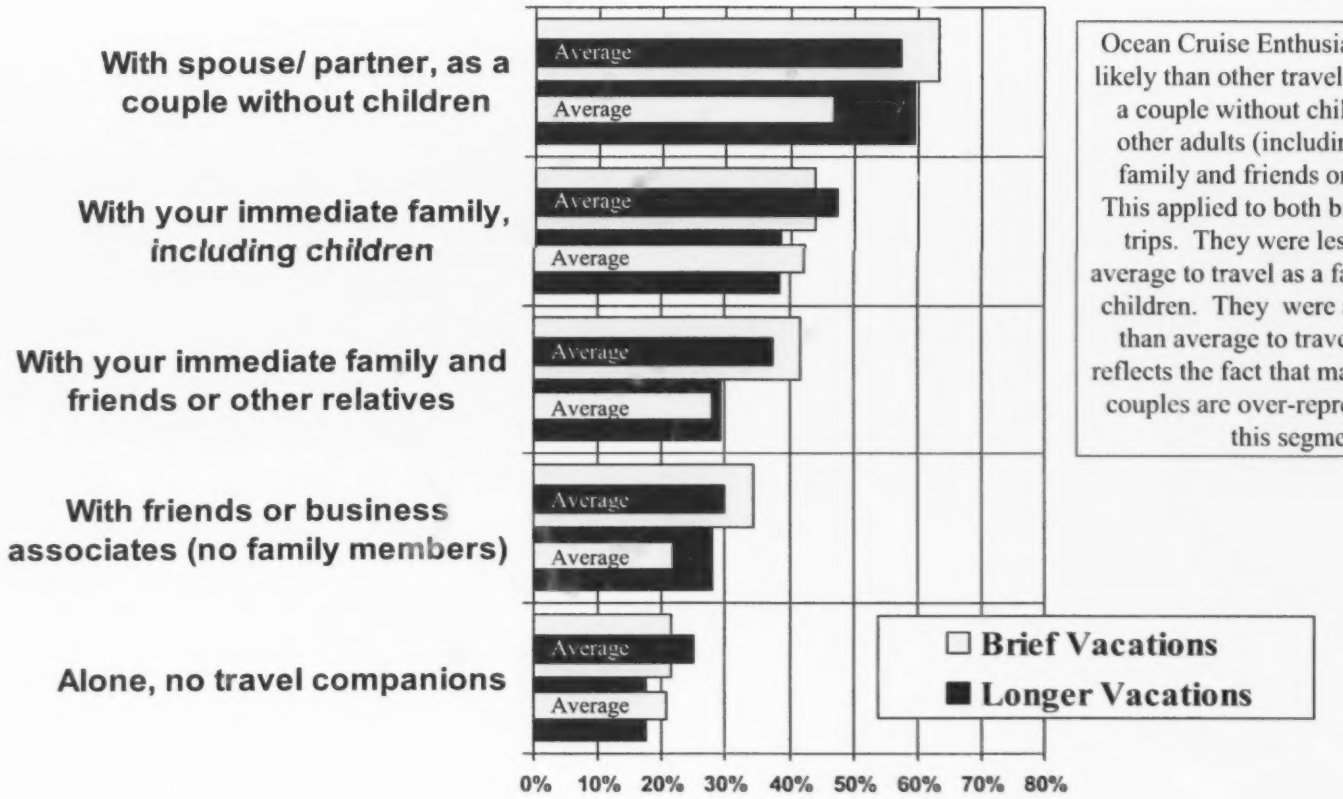


Ocean Cruise Enthusiasts generally parallel the average traveller in the incidence of different types of overnight business trips taken during the past two years.

Composition of Travel Party for Brief and Longer Trips During Past Two Years

Ocean Cruise Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

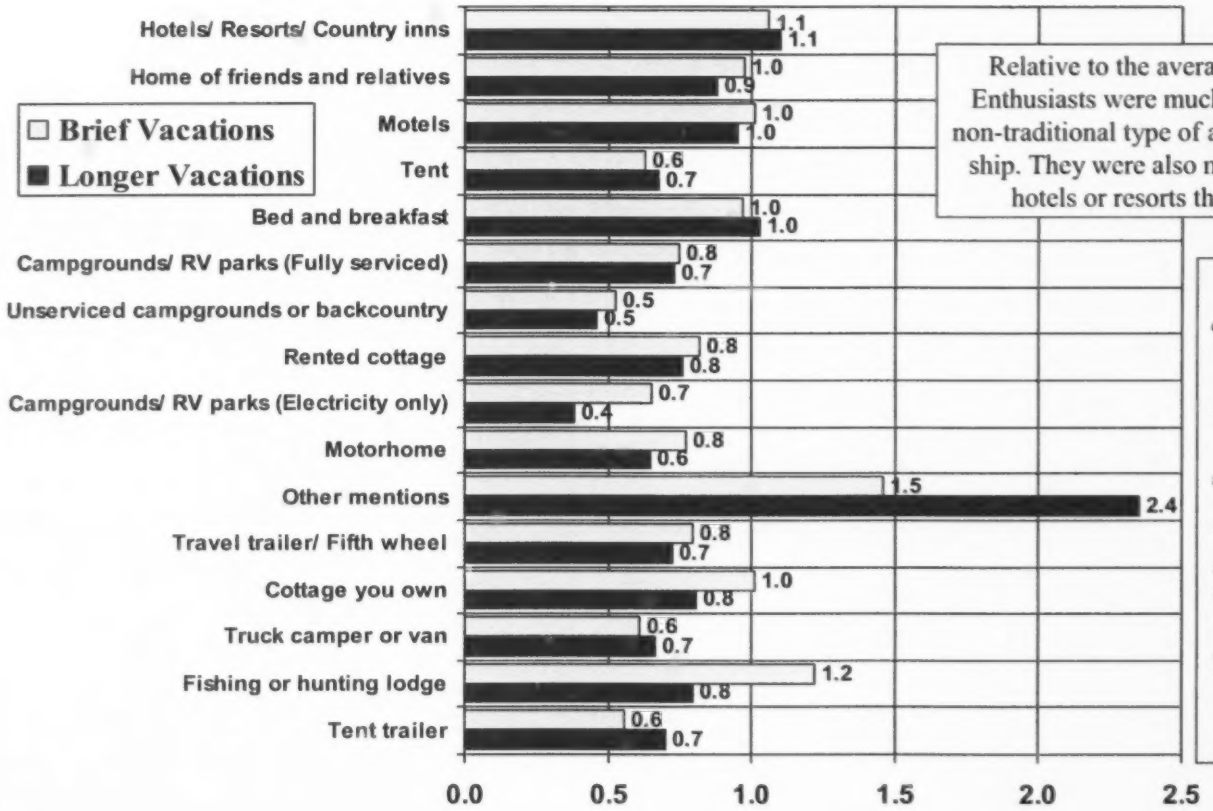


Ocean Cruise Enthusiasts were more likely than other travellers to travel as a couple without children, or with other adults (including immediate family and friends or colleagues). This applied to both brief and longer trips. They were less likely than average to travel as a family with their children. They were also less likely than average to travel alone. This reflects the fact that mature and senior couples are over-represented within this segment.

Types of Accommodations Used for Brief and Longer Trips During Past Two Years (Indexed)

Ocean Cruise Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Relative to the average traveller, Ocean Cruise Enthusiasts were much more likely to have used a non-traditional type of accommodation, most likely a ship. They were also more likely to have stayed in hotels or resorts than the average traveller.

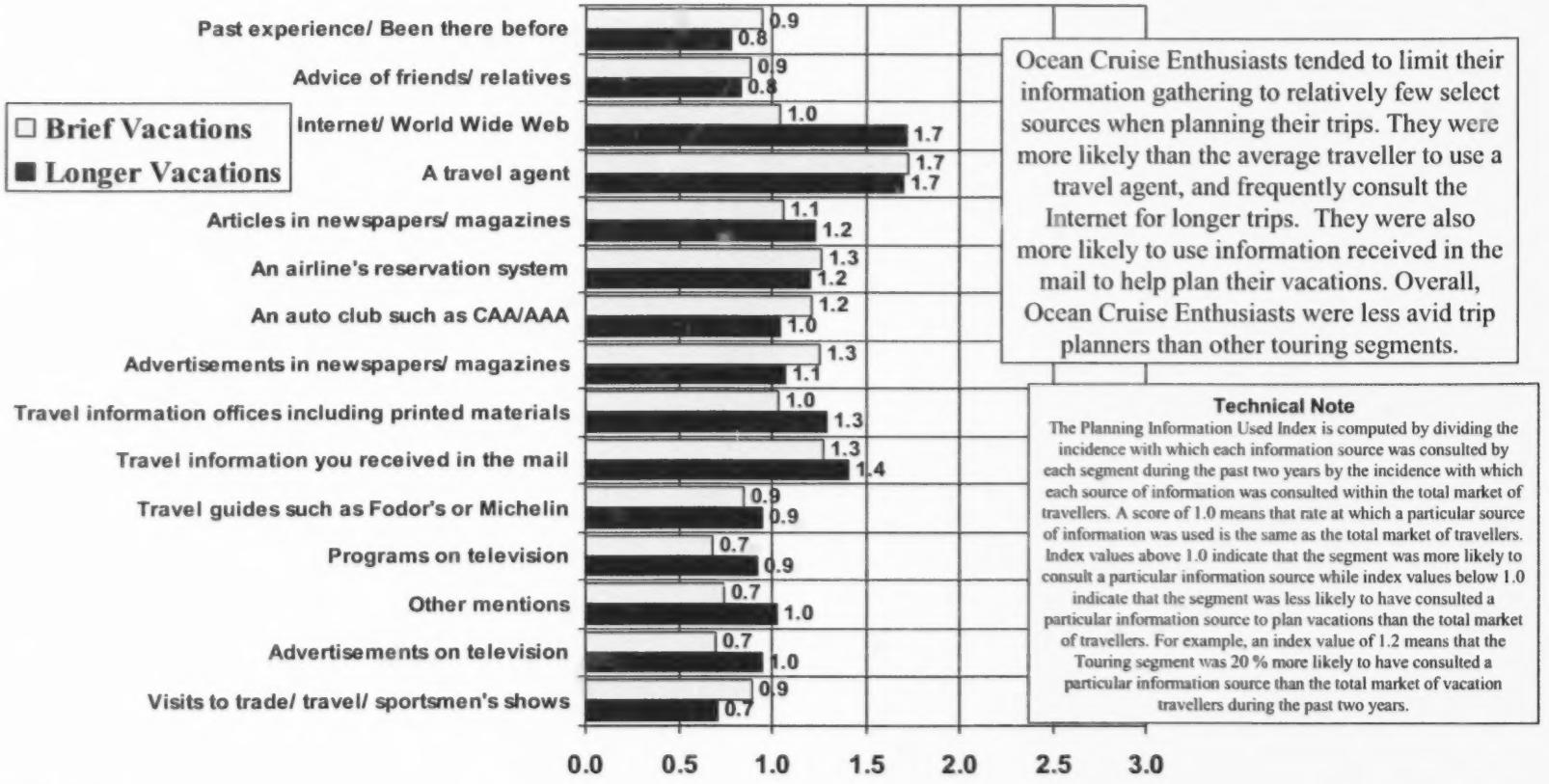
Technical Note

The Accommodation Index is computed by dividing the incidence with which each type of accommodation has been stayed in by each segment during the past two years by the incidence with which each type of accommodation has been stayed in within the total market of travellers. A score of 1.0 means that rate at which a particular type of accommodation has been stayed in is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to have stayed in this type of accommodation while index values below 1.0 indicate that the segment is less likely to have stayed in a particular type of accommodation relative to the total market of travellers. For example, an index value of 1.2 means that the Touring segment is 20 % more likely to have stayed in this particular type of accommodation than the total market of vacation travellers during the past two years.

Information Sources Used to Plan Brief and Longer Trips During Past Two Years (Indexed)

Ocean Cruise Enthusiasts

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Ocean Cruise Enthusiasts tended to limit their information gathering to relatively few select sources when planning their trips. They were more likely than the average traveller to use a travel agent, and frequently consult the Internet for longer trips. They were also more likely to use information received in the mail to help plan their vacations. Overall, Ocean Cruise Enthusiasts were less avid trip planners than other touring segments.

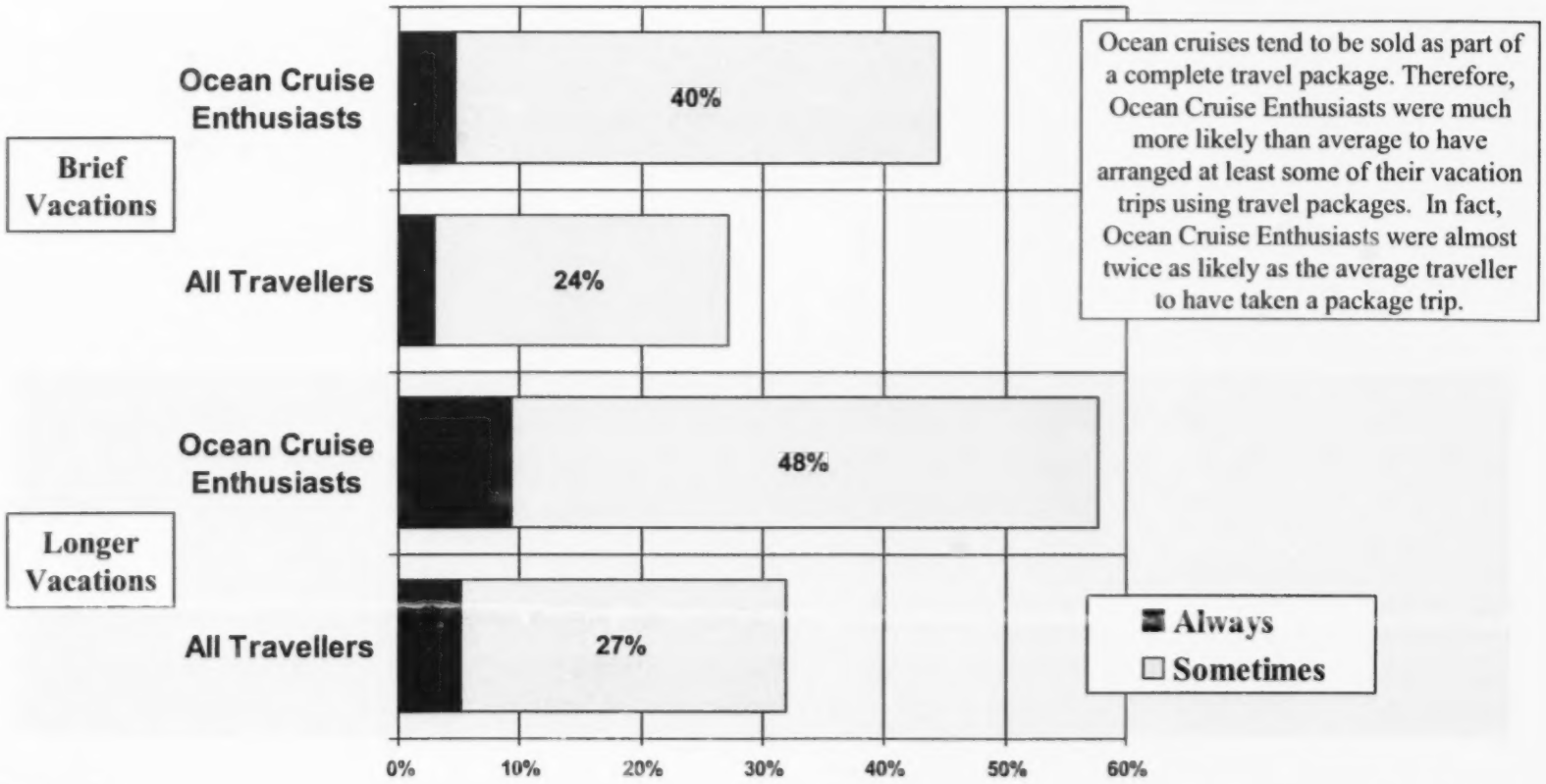
Technical Note

The Planning Information Used Index is computed by dividing the incidence with which each information source was consulted by each segment during the past two years by the incidence with which each source of information was consulted within the total market of travellers. A score of 1.0 means that rate at which a particular source of information was used is the same as the total market of travellers. Index values above 1.0 indicate that the segment was more likely to consult a particular information source while index values below 1.0 indicate that the segment was less likely to have consulted a particular information source to plan vacations than the total market of travellers. For example, an index value of 1.2 means that the Touring segment was 20 % more likely to have consulted a particular information source than the total market of vacation travellers during the past two years.

How Often Travel Packages Used for Brief and Longer Vacations During Past Two Years

Ocean Cruise Enthusiasts

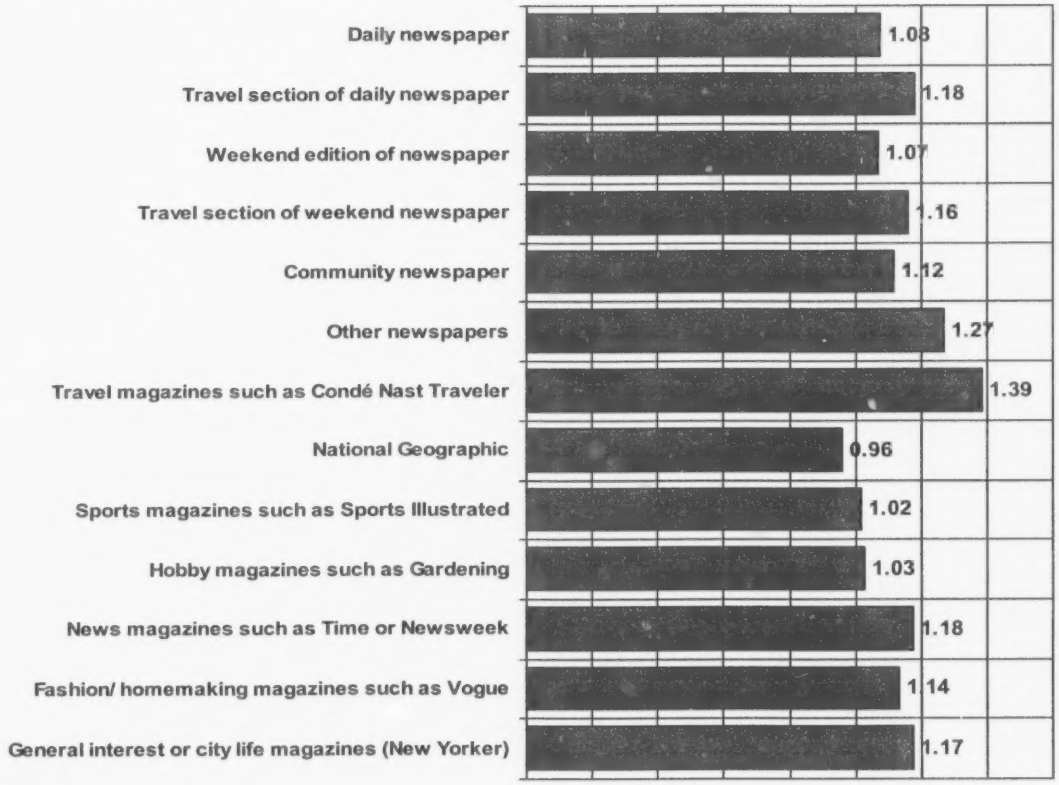
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media Index for Print Media: Canada & United States

Ocean Cruise Enthusiasts

Percent Reading Each Publication Type in Segment By Percent Reading Each Publication Type Among Travellers
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that Ocean Cruise Enthusiasts can best be reached through travel magazines, news magazines, general interest or city life magazines, and fashion or homemaking magazines. Ocean Cruise Enthusiasts were also more likely to read the travel sections of daily or weekend newspapers than the average traveller.

Technical Note

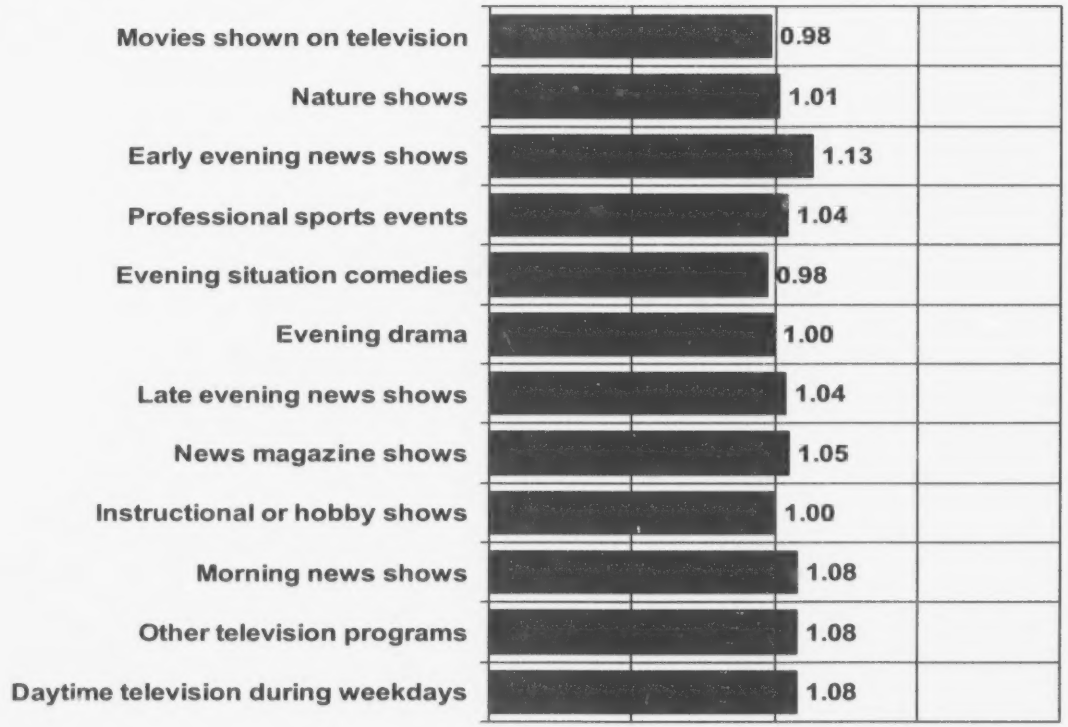
The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that Ocean Cruise Enthusiasts were 20 % more likely to read a particular publication than the total market of vacation travellers.

Media Index for Television Programming: Canada & United States

Ocean Cruise Enthusiasts

Percent Watching Each Type of Program in Segment By Percent Watching Each Type of Program Among Travellers

Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



The television program viewing preferences of Ocean Cruise Enthusiasts were comparable to those of other travellers with the exception of early evening news programming.

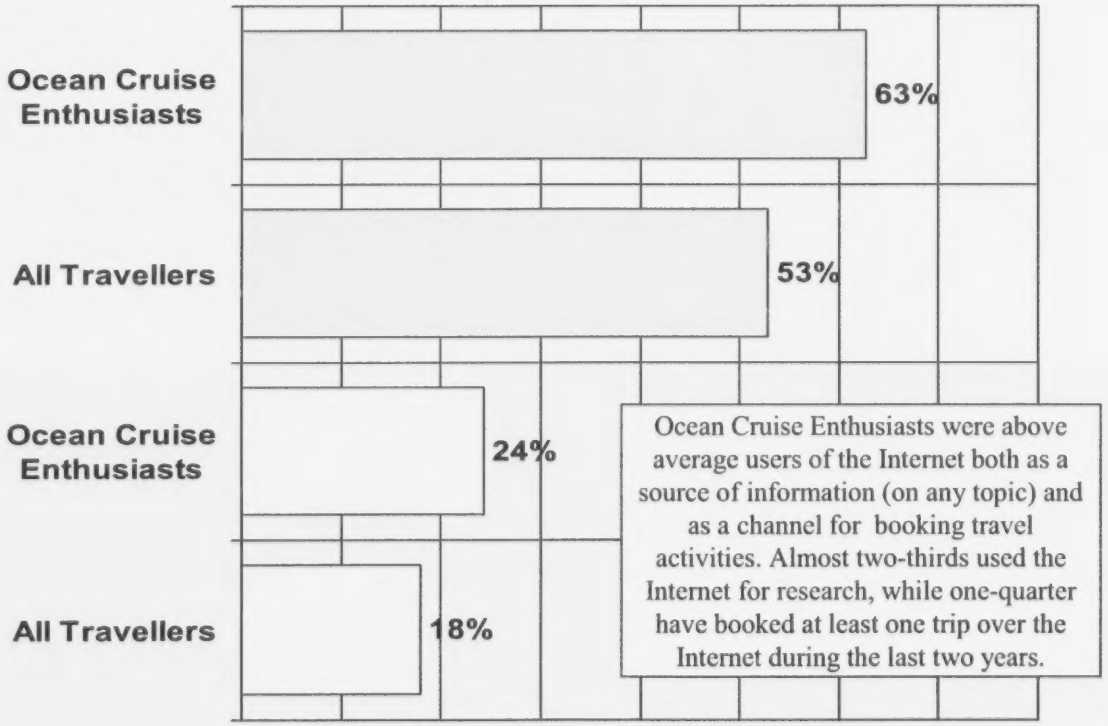
Technical Note

The Media Index is computed by dividing the percent within each segment routinely watching each program by the percent in the total market who routinely watches each program. A score of 1.0 means that viewership is the same as the total market. Index values above 1.0 indicate that the viewership is above average while index values below 1.0 indicate that viewership is below average. For example, an index value of 1.2 means that Ocean Cruise Enthusiasts were 20 % more likely to watch a particular program than the total market of vacation travellers.

Percent Using Internet and Booking At Least One Trip Using the Internet

Ocean Cruise Enthusiasts

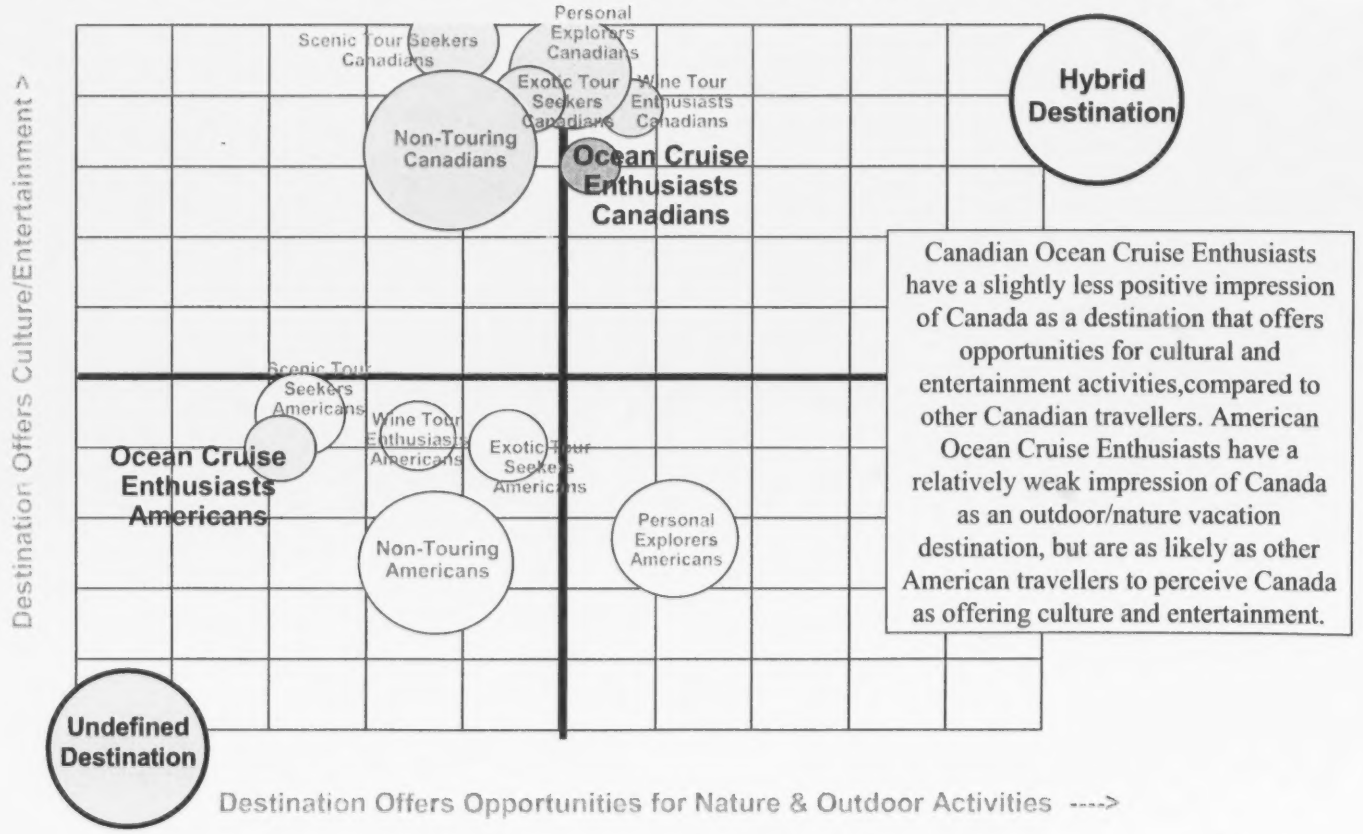
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Vacation Imagery of Canada

Ocean Cruise Enthusiasts

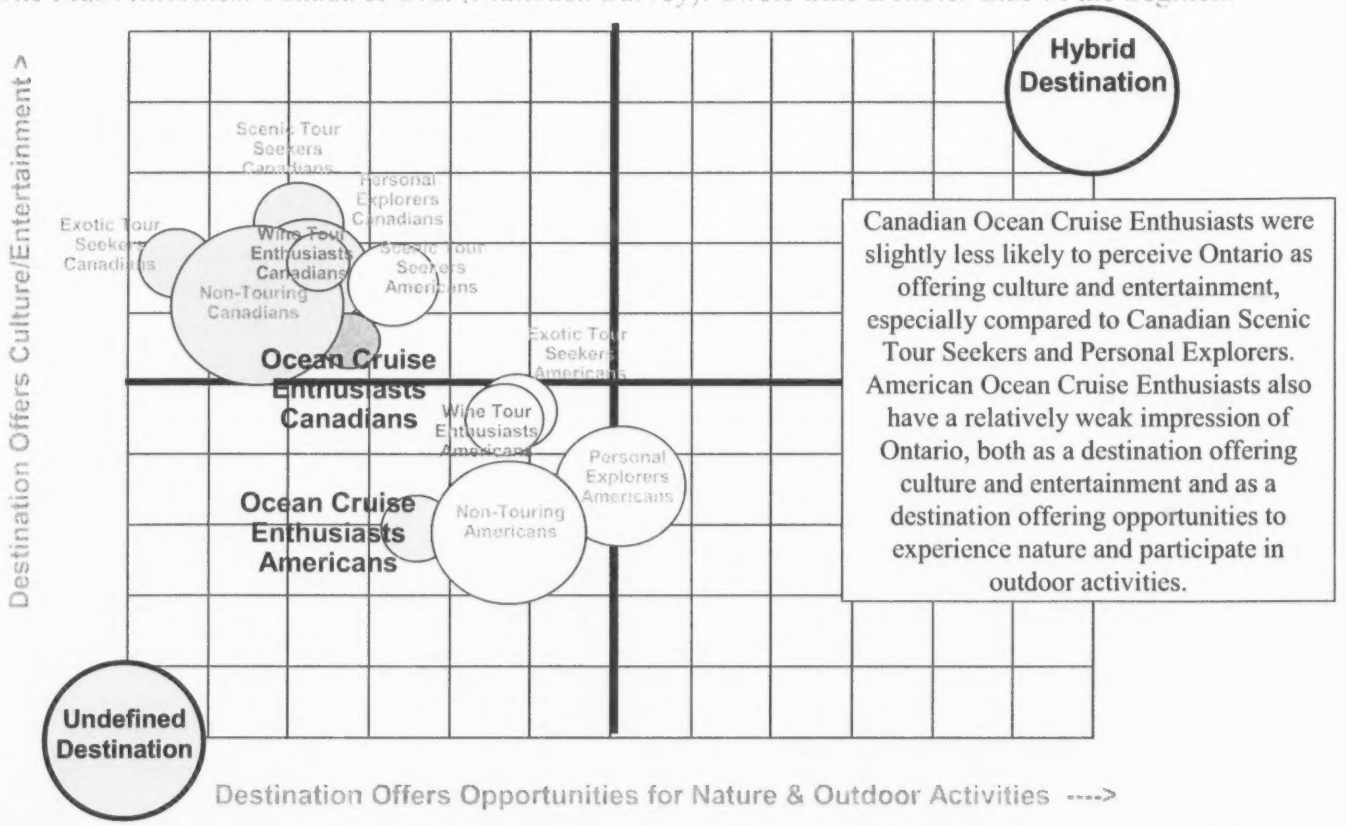
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Canada On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



Vacation Imagery of Ontario

Ocean Cruise Enthusiasts

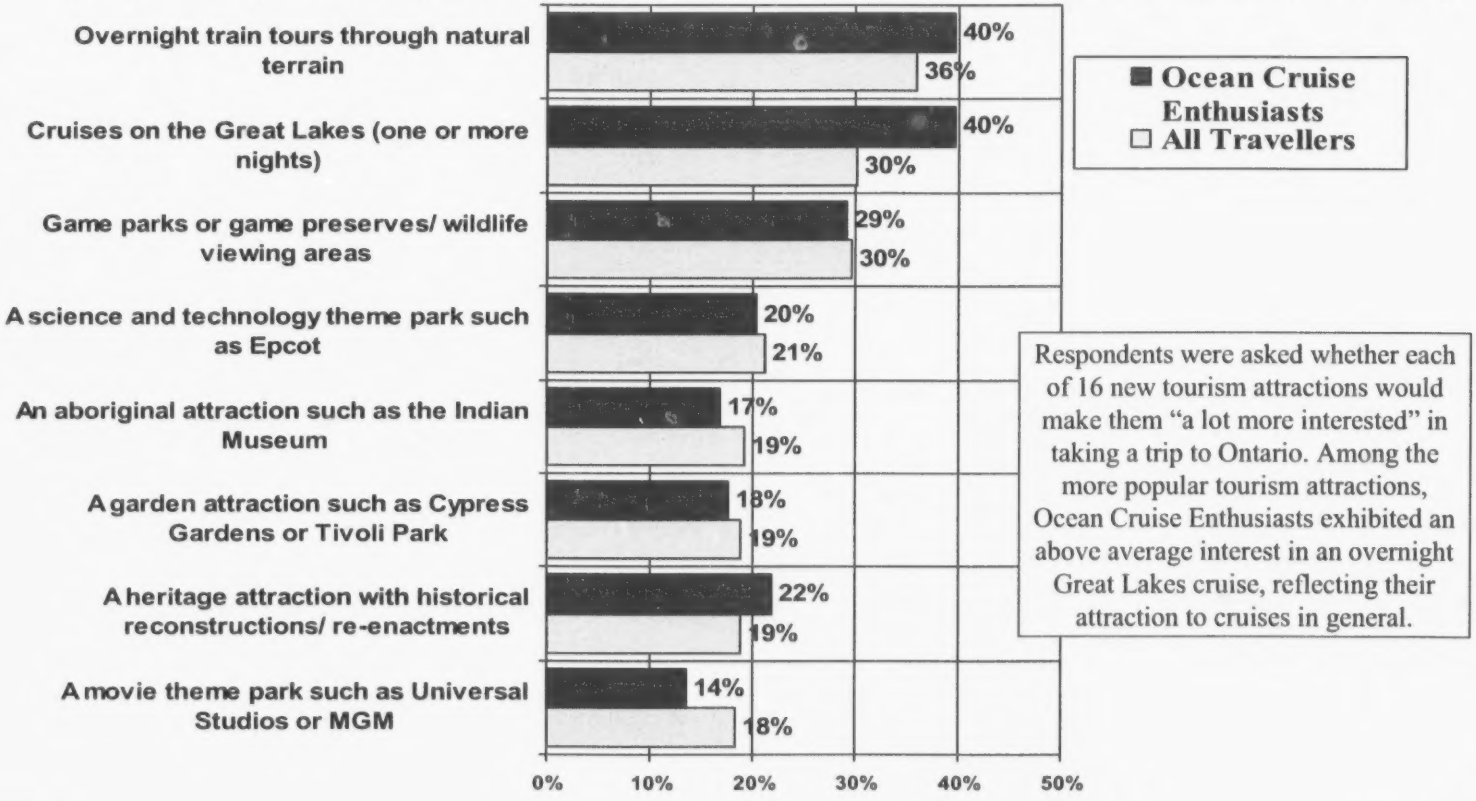
Base: Total Population (18 Plus) Who Took a Vacation Trip in the Last Two Years and Were Able to Rate Ontario On One Plus Attributes: Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Segment



Interest in New Tourism Products

Ocean Cruise Enthusiasts (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

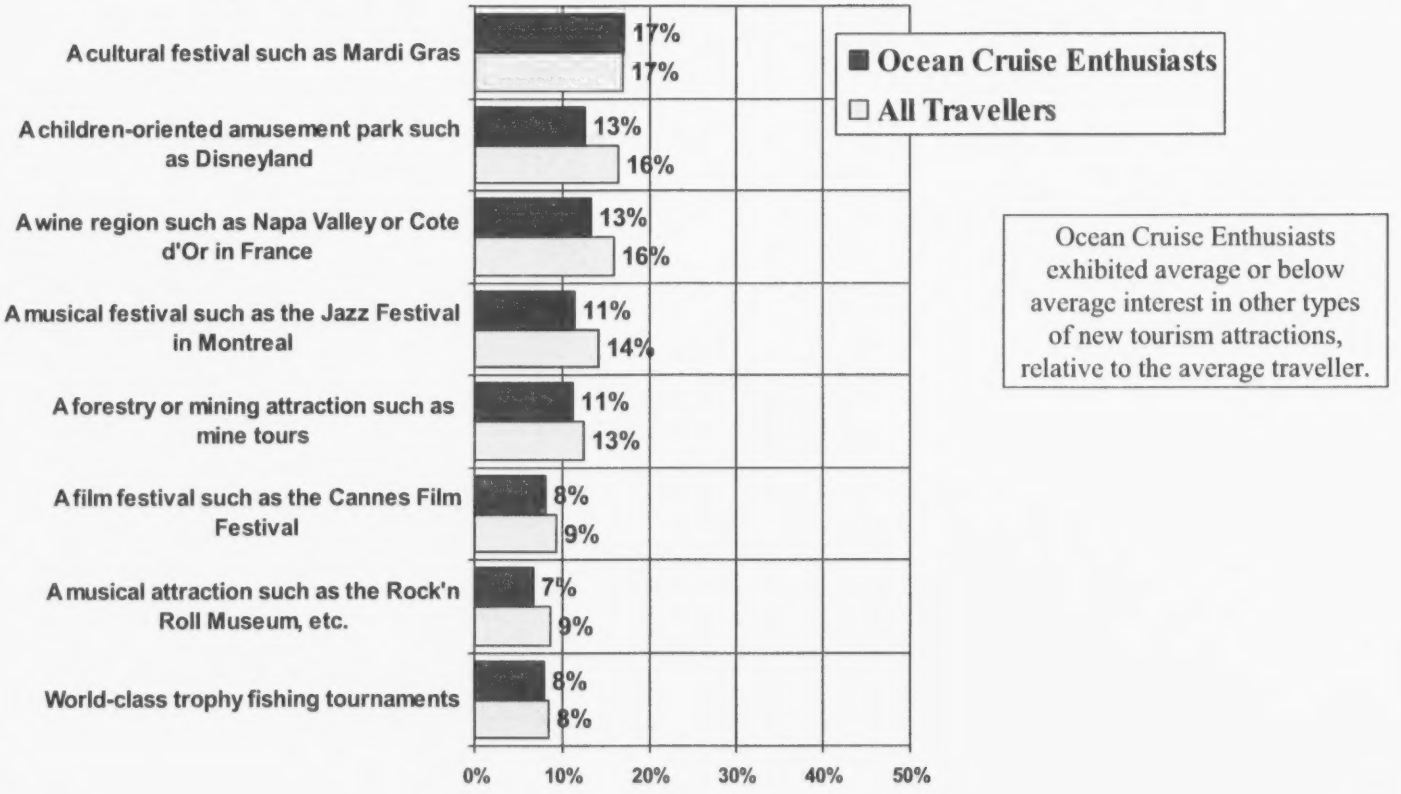


Respondents were asked whether each of 16 new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, Ocean Cruise Enthusiasts exhibited an above average interest in an overnight Great Lakes cruise, reflecting their attraction to cruises in general.

Interest in New Tourism Products

Ocean Cruise Enthusiasts (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Ocean Cruise Enthusiasts exhibited average or below average interest in other types of new tourism attractions, relative to the average traveller.

Travel Activities & Motivation Survey

TAMS Technical Appendices

(For Use With Profile Reports)

TAMS
Travel Activities &
Motivation Survey

March, 2001

Lang

Appendix One

Statistical Precision and Confidence Intervals

Since the survey is based on a random probability sample (rather than a complete census), the statistics reported in this study are estimates. The accuracy of these estimates will vary from analysis to analysis depending on the sample size, the type of measurement reported and measurement variations. The statistical precision associated with any given estimate is reflected by its confidence interval.

A confidence interval is an estimate of the range of values which would be expected by chance alone for a selected probability level. For example, the "95 % confidence interval" is the range of values which would be expected to occur randomly nineteen times out of twenty (or 95 % of the time). Thus, if a survey found that 50 % of the individuals in a sample of 500 were interested in a given activity, the 95 % confidence interval for this estimate would be ±3.5 % (or between 53.5 % to 46.5 %). This means that if this survey were conducted twenty times with the same size of sample the estimated level of interested in a given activity would fall between 53.5 % and 46.5 % nineteen times out of twenty.

The estimated confidence interval is affected by several factors including the sample size, the type of measure taken (i.e., whether the measurement may assume two values such as "yes" or "no" or many values such as "household income") and the level of variation which exists within the data. As a guideline to interpreting the results of this study, estimates of the 95 % confidence intervals are provided for various sample sizes in the table below:

Number of Cases in Sample

Percent	46000	12000	5000	1000	500	100
50.00%	0.05%	0.20%	0.49%	2.45%	4.90%	24.50%
40.00%	0.05%	0.20%	0.47%	2.35%	4.70%	23.52%
30.00%	0.04%	0.17%	0.41%	2.06%	4.12%	20.58%
20.00%	0.03%	0.13%	0.31%	1.57%	3.14%	15.68%
10.00%	0.02%	0.07%	0.18%	0.88%	1.76%	8.82%
5.00%	0.01%	0.04%	0.09%	0.47%	0.93%	4.66%
2.00%	0.00%	0.02%	0.04%	0.19%	0.38%	1.92%

Appendix Two

Telephone Sample Description: Weighted

Attribute	*Level*	*Total*	*Canada*	*U.S.A*
Number of Interviews		46,782	28,397	18,385
Gender	Male	45.0 %	45.1 %	45.0 %
	Female	55.0 %	54.9 %	55.0 %
Age	18 to 25	13.6 %	13.3 %	13.9 %
	26 to 34	20.6 %	20.8 %	20.5 %
	36 to 44	23.3 %	24.1 %	22.8 %
	46 to 54	17.5 %	16.7 %	18.1 %
	56 to 65	11.2 %	11.4 %	11.0 %
	66 Plus	13.7 %	13.7 %	13.7 %
Education Level	High/Trade School	42.5 %	48.6 %	38.6 %
	College or University	49.3 %	46.7 %	51.0 %
	Advanced University Degree	8.1 %	4.7 %	10.4 %
Household Income	Under $20,000	14.8 %	17.8 %	12.8 %
	$20,000 to $40,000	22.9 %	24.6 %	21.8 %
	$40,000 to $60,000	18.9 %	19.0 %	18.9 %
	$60,000 to $80,000	11.8 %	11.7 %	11.8 %
	$80,000 to $100,000	6.4 %	6.3 %	6.4 %
	$100,000 Plus	8.8 %	7.4 %	9.7 %
	Refused/Don't Know	16.5 %	13.2 %	18.6 %

Appendix Two

Mailback Sample Description: Weighted

Attribute	*Level*	*Total*	*Canada*	*U.S.A*
Number of Interviews		11,892	5,490	6,402
Gender	Male	43.7 %	44.0 %	43.6 %
	Female	56.3 %	56.0 %	56.4 %
Age	18 to 25	8.3 %	9.7 %	7.1 %
	26 to 34	17.9 %	19.1 %	16.8 %
	36 to 44	24.8 %	25.3 %	24.3 %
	46 to 54	21.7 %	20.0 %	23.1 %
	56 to 65	14.4 %	14.0 %	14.7 %
	66 Plus	13.0 %	11.9 %	14.0 %
Education Level	High/Trade School	31.8 %	38.0 %	26.5 %
	College or University	56.5 %	55.1 %	57.6 %
	Advanced University Degree	11.7 %	6.9 %	15.8 %
Household Income	Under $20,000	8.9 %	10.4 %	7.5 %
	$20,000 to $40,000	21.8 %	23.1 %	20.7 %
	$40,000 to $60,000	22.3 %	22.6 %	22.1 %
	$60,000 to $80,000	15.6 %	15.5 %	15.7 %
	$80,000 to $100,000	8.5 %	8.8 %	8.2 %
	$100,000 Plus	11.6 %	10.8 %	12.3 %
	Refused/Don't Know	11.3 %	8.8 %	13.5 %

Appendix Three

Household Lifecycle Stage

The Household Lifecycle Stage variable has been constructed taking the following variables into consideration: The age of the respondent; the age of all children under 21 living in the household and the marital status of the respondent. There are eight lifecycle stages identified in this variable:

- Young Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Families: At least one child (of respondent) under 13 living in the home; No restrictions for age or marital status
- Mature Families: At least one child (of respondent) under 21 living in the home; No children under 13 living in the home; No restrictions for age or marital status
- Mature Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Mature Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Senior Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older
- Senior Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older

Appendix Four:
Lifespan Demographic Segments
- Method Used to Construct Segmentation -

Throughout this report the TAMS data will be examined using a market segmentation known as the Lifespan Demographic Segments. This scheme identifies various demographic sectors in the market with common vacation patterns and interests.

The Lifespan Demographic Segmentation scheme is an anchored segmentation where the data has been aggregated by lifecycle stage, education level and household income. Households may be assigned to any given segment with information about the household lifecycle stage, the respondent's education and household income. As such, this scheme is a powerful tool to identify strategic segments.

The Lifespan Demographic Segmentation was developed using the Ontario Tourism Marketing Partnership tracking program based 7,241 interviews conducted between July 12, 1999 and April 26, 2000. The segmentation scheme uses information about the types of trips taken by each household, the respondent's tendency to research vacations and the household's vacation experience preferences and interests. 31 core segmentor variables were used in this analysis including: The incidence of 19 types of vacation travel (e.g., family urban explorations, couples retreats, family visits, adventure travel); the extent to which vacations are carefully planned; the amount of information consulted to plan vacations; interest in opportunities to learn while on vacation; interest in novel and exotic destinations; interest in family-suitable vacations; the appeal of vacation packages; the appeal of outdoor vacations; the appeal of cultural exploration; the appeal of pampering and entertainment; the appeal of excitement and nightlife and the appeal of relaxing in quiet setting while on vacation.

Appendix Four: Lifespan Segmentation Descriptions

Youth Segments

The three youth segments represent 20.3 % of the total market. Two of these are classified as Affluent Segments because of their household incomes and/or level of education. These households are all under 35, do not have children and are single or married couples.

Affluent Young Singles

- 5.9 % of market; 6.5 % of Canadian market; 5.8 % of U.S. market
- Lifecycle Stages: 100 % young singles; 64.0 % of respondents male
- Average Age: 25.3 years; Age Range: 54.5 % 18 to 25; 45.5 % 26 to 35
- Education: 67.7 % university or college educated; 9.7 % with advanced degrees (e.g., masters)
- Average household income: $72,000; Income Categories: 68.7 % $40K to $80K; 31.3 % $80K Plus

Affluent Young Couples

- 2.7 % of market; 3.9 % of Canadian market; 2.6 % of U.S. market
- Lifecycle Stages: 100 % young couples; 42.8 % of respondents male
- Average Age: 28.9 years; Age Range: 18.8 % 18 to 25; 81.2 % 26 to 35
- Education: 100 % university or college educated; 17.8 % with advanced degrees (e.g., masters)
- Average household income: $74,400; Income Categories: 66.2 % $40K to $80K; 33.8 % $80K Plus

Mainstream Youth Market

- 11.8 % of market; 13.2 % of Canadian market; 11.6 % of U.S. market
- Lifecycle Stages: 73 % young singles; 27 % young couples; 56.9 % of respondents male
- Average Age: 25.0 years; Age Range: 57.4 % 18 to 25; 42.6 % 26 to 35
- Education Level: 53 % university/college educated; 4.5 % with advanced degrees (e.g., masters)
- Average household income: $24,600; Categories: 93.3 % less than $40K; 6.8 % $40K to $80K

Appendix Four: Lifespan Segmentation Descriptions

Family Segments

The three family segments represent 36.2 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. All of these households have children under 21 and are primarily married. The Mainstream Young Families have at least one child 12 or younger while the Mainstream Mature Families have children between the ages of 13 and 21 (but no children 12 and under).

Affluent Families

- 6.6 % of market; 5.8 % of Canadian market; 6.7 % of U.S. market
- Lifecycle Stages: 69.9 % young families; 26.4 % mature families; 50 % of respondents male
- Average Age: 41.2 years; Age Range: 23.9 % under 35; 46.8 % 36 to 45; 29.3 % 46 and older
- Education: 100.0 % university or college educated; 29.1 % with advanced degrees (e.g., masters)
- Average household income: $107,400; Income Categories: 2.3 % $40K to $80K; 97.7 % $80K plus

Mainstream Young Families

- 23.0 % of market; 20.1 % of Canadian market; 23.4 % of U.S. market
- Lifecycle Stages: 100 % families with children 12 or younger; 42.9 % of respondents male
- Average Age: 35.3 years; Age Range: 52.8 % under 35; 37.1 % 36 to 45; 10.1 % 46 and older
- Education: 50 % university or college educated; 5.5 % with advanced degrees (e.g., masters)
- Average household income: $42,800; Income Categories: 49.0 % less than $40K; 51.0 % $40K plus

Mainstream Mature Families

- 6.6 % of market; 8.1 % of Canadian market; 6.4 % of U.S. market
- Lifecycle Stages: 100 % families with children between 13 and 21; 45.1 % of respondents male
- Average Age: 45.3 years; Age Range: 7.8 % under 35; 47.6 % 36 to 45; 44.6 % 46 and older
- Education Level: 47 % university/college educated; 5.5 % with advanced degrees (e.g., masters)
- Average household income: $48,200; Income Categories: 37.9 % less than $40K; 62.1 % $40K plus

Appendix Four: Lifespan Segmentation Descriptions

Mature Segments

The three mature segments represent 30.4 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. These households are all between 36 and 64 and do not have children. (Note: 3.8 % of the mature market has been classified with seniors in the Affluent Mature & Senior Couples).

Affluent Mature Singles

- 5.1 % of market; 2.4 % of Canadian market; 5.4 % of U.S. market
- Lifecycle Stages: 100 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 48.5 years; Age Range: 40.2 % 36 to 45; 37.6 % 46 to 55; 22.2 % 56 to 65
- Education: 100 % university or college educated; 26.5 % with advanced degrees (e.g., masters)
- Average household income: $71,000; Income Categories: 72.8 % $40K to $80K; 27.2 % $80K plus

Mainstream Mature Couples

- 12.8 % of market; 18.0 % of Canadian market; 12.3 % of U.S. market
- Lifecycle Stages: 100 % mature couples (36 to 65); 52.1 % of respondents male
- Average Age: 52.1 years; Age Range: 23.4 % 36 to 45; 38.4 % 46 to 55; 38.2 % 56 to 65
- Education: 48 % university or college educated; 6.0 % with advanced degrees (e.g., masters)
- Average household income: $49,600; Income Categories: 34.1 % less than $40K; 59.8 % $40K plus

Mainstream Mature Singles

- 8.6 % of market; 6.8 % of Canadian market; 8.9 % of U.S. market
- Lifecycle Stages: 73 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 50.2 years; Age Range: 35.0 % 36 to 45; 34.0 % 46 to 55; 31.1 % 56 to 65
- Education Level: 42 % university/college educated; 3.9 % with advanced degrees (e.g., masters)
- Average household income: $28,800; Income Categories: 84.0 % less than $40K; 16.0 % $40K plus

Appendix Four: Lifespan Segmentation Descriptions

Mature/Seniors Segments

The three mature/senior segments represent 16.8 % of the total market. One of these segments is classified as an affluent segment because of its household incomes and/or level of education. The Affluent Mature and Senior Couples are primarily (85 %) from the mature market while the Mainstream Senior Couples and Senior Singles are all over 66 years old.

Affluent Mature and Senior Couples

- 4.5 % of market; 3.5 % of Canadian market; 4.7 % of U.S. market
- Lifecycle Stages:85 % mature couples (35 - 65); 15 % senior couples (66 plus); 54.6 % male
- Average Age: 54.5 years; Age Range: 21.0 % 36 to 45; 37.3 % 46 to 55; 41.7 % 56 plus
- Education: 100 % university or college educated; 30.8 % with advanced degrees (e.g., masters)
- Average household income: $108,600; Income Categories: 100 % $80K plus

Mainstream Senior Couples

- 5.0 % of market; 6.5 % of Canadian market; 4.8 % of U.S. market
- Lifecycle Stages: 100 % senior couples (66 plus); 56.1 % of respondents male
- Average Age: 72.7 years; Age Range: 100 % 66 plus
- Education: 42.4 % university or college educated; 5.8 % with advanced degrees (e.g., masters)
- Average household income: $37,900; Income Categories: 57.4 % Less than $40K; 42.6 % $40K plus

(Affluent and Mainstream) Senior Singles

- 7.3 % of market; 5.1 % of Canadian market; 7.5 % of U.S. market
- Lifecycle Stages: 100 % senior singles; 35.6 % of respondents male
- Average Age: 74.9 years ; Age Range: 100 % 66 plus
- Education Level: 43 % university/college educated; 8.0 % with advanced degrees (e.g., masters)
- Average household income: $28,600; Income Categories: 78.7 % Less than $40K; 21.3 % $40K plus

Appendix Five

Factor Analysis of Vacation Experiences Sought During Past 2 Years

The vacation experiences sought in the last two years were submitted to a factor analysis to identify underlying vacation experiences sought in pleasure travel. Factor analysis is a statistical technique which identifies and uses the association between individual responses to generate more general (or abstract) measures of the vacation experiences sought.The factors may be used to generate factor scores which reflect the general vacation experiences sought. This analysis identified to the following five vacation experience factors:

Exploration: To visit historical sites and important places in history; To see natural wonders and important natural sites; To experience different cultures and ways of life; To experience unspoiled nature

Personal Indulgence: To visit a popular, trendy place; To visit casinos and gamble; To experience "the good life" - fine cuisine, being pampered; To experience city life (e.g., nightlife, shopping, museums)

Romance & Relaxation: To rest, relax and recuperate; For intimacy and romance; To spend quality time with the family away for home

Sports, Hobbies & Learning: To participate in a hobby or sport (e.g., golf, fishing, photography); To participate in a hands-on learning experience (e.g., archaeological digs, cooking courses)

Socializing: To visit friends or relatives who live in another city or country; To spend time with a group of good friends; To be someplace that feels familiar and safe

Appendix Six
Factor Analysis of Outdoor Activities While Traveling

The outdoor vacation activities sought in the last two years were submitted to a factor analysis to identify general outdoor activities sought in travel. Factor analysis is a statistical technique which uses the association between individual responses to construct more general (or abstract) categories of outdoor activities sought by individuals while travelling. The factors may be used to generate factor scores which measure the degree to which these general categories of outdoor activities have been pursued by various types of travelers. This analysis identified to the following seventeen types of outdoor activities:

Competitive Sports: Playing basketball; Baseball; Football; Volleyball; Bowling; Soccer ; Chess or backgammon; Tennis

Nature Sports: White water rafting; Kayaking and canoeing; Hiking or backpacking; Horseback riding

Water Sports: Sailing; Wind surfing; Scuba diving

Extreme Sports: Hang-gliding; Hot air ballooning; Parachuting; Bungee jumping

Golfing: Golfing at a resort; Taking a golf packaged tour; Playing occasional golf game

Biking: Recreational biking; Mountain biking; Biking on overnight tour trip

Motorcycling: Motorcycling on overnight touring trip; Motorcycling - Day excursion

Fishing: Salt water fishing; Fresh water fishing; Motor-boating

Hunting: Hunting big game; Hunting small game

Fitness: Jogging outdoors; Working out in fitness center

Skiing and Snowboarding: Cross-country skiing (day activity; overnight tour group); Downhill skiing; Snowboarding

Snowmobiling: Snowmobiling as an overnight tour trip; Snowmobiling on organized trails

Skating and Hockey: Ice skating; Playing ice hockey; In-line/Roller skating

Rock & Ice Climbing: Rock climbing; Ice climbing; Heli-skiing

Swimming & Sunbathing: Sunbathing or sitting on a beach; Swimming in oceans; Swimming in lakes

Natural Sight-Seeing: Wildflower & flora viewing; Bird watching; Going on picnics in park settings

Natural Phenomena: Seeing the Northern Lights or other Arctic experiences; Whale watching

Appendix Seven

Factor Analysis of Cultural & Entertainment Activities Participated In

The cultural and entertainment vacation activities sought in the last two years were submitted to a factor analysis to identify general categories of cultural and entertainment activities sought during travel. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories of cultural and entertainment activities that tend to be sought by individuals while travelling. The factors may be used to generate factor scores which measure the degree to these which general categories of cultural and entertainment activities have been pursued by various segments of the travel market. This analysis identified to the following fifteen activity types:

Shopping & Dining: **Shopping or browsing**: Clothing, shoes, jewelry; Bookstores and music stores; Local arts and crafts; Gourmet food; **Restaurant dining**: Regional or local cooking; Acclaimed restaurants

Museums, Art Galleries & Historical Sites: General history/heritage museums, Historical sites (e.g., Statue of Liberty, Fort Alamo), Science & technology museums, Historical replicas/reenactments, Art galleries

High Arts: Opera, Classical concerts, Ballet or other dance performance, Live theatre

Theme Parks: Movie theme parks (MGM studios), Science & technology theme parks (Epcot), Amusement parks (Disneyland)

Professional Sports: Baseball, Football, Basketball, Ice hockey, Professional Golf

Zoos, Aquariums, Planetariums: Zoos, Aquariums, Children's Museums, Planetariums

Agricultural and Local Fairs: Farmer's fair or market, Local festivals or fairs, Pick-your-own farms or participating in harvesting, Shop or browse for antiques

Concerts, Carnivals or Festivals: Music festivals, Carnivals such Mardi Gras, Jazz concerts, Rock & roll concerts, Musical attractions like Rock'n Roll Museum

Aboriginal Cultural Experiences: Aboriginal cultural experiences in remote settings, Powwows or other aboriginal celebrations, Aboriginal attractions such as the Indian Museum

Gardening and Natural Wonders: Botanical gardens, Garden attractions such as Cypress Gardens or Tivoli Park, Natural wonders such as Niagara Falls or the Grand Canyon

Cultural Festivals: Literary festivals or events, Theatre festivals, International film festivals

National/International Sporting Events: National/International sporting events, Professional figure skating

Gambling and Racing: Horse racing, Casinos, Auto racing

Rodeo and Amateur Tournaments: Western theme events such as rodeos; Amateur sports/arts/hobby tournaments

French Canadian Cultural Experiences: French Canadian cultural experiences

Appendix Eight
Factor Analysis of Accommodation-Related Activities Participated In

The types of accommodations-related activities participated in during the last two years were submitted to a factor analysis to identify general activity-related accommodation types. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories if activity-related accommodations. The factors may be used to generate factor scores which measure the degree to which general types of activity-related accommodations have been stayed in by each segment of the travel market. This analysis identified to the following seven types of activity-related accommodations:

Camping: Camping outside of public camp grounds, Camping in public camp grounds, Camping in wilderness settings

Cooking & Wine Tasting Schools: Staying at cooking school, Staying at wine tasting schools

Lakeside or Wilderness Lodges (Vehicle Accessible): Vehicle accessible wilderness lodge, Lakeside resort in summer, Lakeside resort in winter

Remote Fly-in Lodges or Outposts: Staying at remote fly-in outpost, Staying at remote fly-in lodge

Ski Resorts: Staying ski resort in summer, Staying at ski resort in winter

Seaside Resorts: Staying at seaside resort in winter, Staying at seaside resort in summer

Bed & Breakfast, Health Spas & Gourmet Restaurants With Accommodations: Staying at bed and breakfast, Staying at health spa, Staying at gourmet restaurants

Appendix Nine
Factor Analysis of Tours & Cruises Taken During Last 2 Years

The tours and cruise types taken during the last two years were submitted to a factor analysis to identify general tour/cruise types. Factor analysis is a statistical technique which uses the association between responses to individual items to construct more general (or abstract) categories of touring activities. The factors may be used to generate factor scores which measure the degree to which each category of tours had been taken by various types of travelers. This analysis identified to seven types of tours and cruises:

Tours By Personal Vehicles: Coastal or lakeshore scenic drives by day, Wandering around small villages & towns - overnight

Guided Bus Tours: Scenic day tours in countryside by bus, Guided bus day tours in cities, Guided scenic tours of country-side involving an overnight stay

Wine Tours: Going to wineries for day visits, Touring a region's wineries involving an overnight stay

Specialty Cruises: Great Lake cruises by boat involving an overnight stay, Submarine cruises involving an overnight stay

Scenic Tours By Boat or Train: Scenic day or evening tour by boat, Scenic day tours by train

Scenic Day Tour By Air: Scenic day tour by air

Ocean Cruises: Ocean cruises

Appendix Ten
Factor Analysis of Canada's Image Attributes

The image ratings of Canada and Ontario were factor analyzed to identify the primary image dimensions upon which Canada and Ontario were assessed. Factor analysis is a statistical technique which uses the association between each individual image attribute to construct more general image attributes. The more general image dimensions identified through this process are considered to reflect the underlying (or true) impressions of Canada and Ontario that have been the basis of the individual's response to each attribute. The factors may be used to generate factor scores which measure the degree to which each general impression of Canada or Ontario is held by the respondent. The 25 image factors were grouped into two broader image dimensions as follows:

Culture & Entertainment

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centers than its natural richness and opportunities for outdoor vacation activities. The specific image attributes that tend to be associated with this factor include: A popular, trendy place; A place with many cultural attractions and events; A great place to experience city life (e.g., nightlife, shopping); A place with interesting shops; A place you go for romance; A great place to see historical sites and important places in history; A place with lots of things for young adults to see and do; A place with lots for families to see and do; A great place to experience different cultures and ways of life; A place with lots of things for mature adults to see and do.

Nature & Outdoor Activities

A destination that is perceived to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for and to be a place that respects the natural environment. Destinations which offer opportunities to experience nature and participate in outdoor activities are also perceived to be very safe for tourists, great places to relax and get away from it and great places for adventure and excitement. Such destinations are generally better known for their natural richness than their urban and cultural richness. The specific image attributes that tend to be associated with this factor include: A great place for hunting; A place that respects the natural environment; One of the best destinations for outdoor activities; A place with beautiful scenery; A place that is very clean and well cared for; A place that is safe for tourists; A great place for adventure and excitement; A great place to relax and get away from it all

Culture & Entertainment

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centers than its natural richness and opportunities for outdoor vacation activities.

- A popular, trendy place
- A place with many cultural attractions and events
- A great place to experience city life (e.g., nightlife, shopping)
- A place with interesting shops
- A place you go for romance
- A great place to see historical sites and important places in history
- A place with lots of things for young adults to see and do
- A place with lots for families to see and do
- A great place to experience different cultures and ways of life
- A place with lots of things for mature adults to see and do

Nature and Outdoor Activities

A destination that is perceived to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for and to be a place that respects the natural environment. Destinations which offer opportunities to experience nature and participate in outdoor activities are also perceived to be very safe for tourists, great places to relax and get away from it and great places for adventure and excitement. Such destinations are generally better known for their natural richness than their urban and cultural richness.

- A great place for fishing
- A great place for hunting
- A place that respects the natural environment
- One of the best destinations for outdoor activities
- A place with beautiful scenery
- A place that is very clean and well cared for
- A place that is safe for tourists
- A great place for adventure and excitement
- A great place to relax and get away from it all